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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

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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 LAVIN FAMILY FOUNDATION		<b>A Employer identification number</b>  36-6106074	
Number and street (or P O box number if mail is not delivered to street address) 5001 SW 27TH AVENUE		<b>B Telephone number</b> (see instructions)  (312) 477-7603	
City or town, state or province, country, and ZIP or foreign postal code OCALA, FL 34474		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply <div><input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change</div>		<b>D 1.</b> Foreign organizations, check here <input type="checkbox"/> <b>2.</b> Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
<b>H</b> Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		<b>E</b> If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
<b>I</b> Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input type="checkbox"/> \$ 69,949,595		<b>F</b> If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
<b>J</b> Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see 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)				
	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	853,560	929,622		
	4 Dividends and interest from securities. . . . .	710,556	636,553		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	3,260,362			
	b Gross sales price for all assets on line 6a 43,320,862				
	7 Capital gain net income (from Part IV, line 2) . . .		3,260,362		
	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 . . . . .	4,824,478	4,826,537		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0	0		0
	14 Other employee salaries and wages . . . . .				
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule). . . . .				
	b Accounting fees (attach schedule). . . . .				
	c Other professional fees (attach schedule) . . . . .	5,368	5,368		0
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)	23,413	21,314		0
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule). . . . .	370,283	369,638		0
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	399,064	396,320		0
	25 Contributions, gifts, grants paid . . . . .	4,140,500			4,140,500
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	4,539,564	396,320		4,140,500
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	284,914			
	b <b>Net investment income</b> (if negative, enter -0-)		4,430,217		
	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 . . . . .	11,836,029	5,838,420	5,816,168
	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)	7,000,000	 7,000,000	6,297,090
	b	Investments—corporate stock (attach schedule) . . . . .	23,429,667	 37,003,427	42,304,043
	c	Investments—corporate bonds (attach schedule). . . . .	22,839,159	 15,547,922	15,532,294
	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	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	65,104,855	65,389,769	69,949,595
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	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	0	0	
Net Assets or Fund Balances		<b>Foundations that follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>			
	24	Unrestricted . . . . .			
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
		<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 27 through 31.</b>			
	27	Capital stock, trust principal, or current funds . . . . .	65,104,855	65,389,769	
	28	Paid-in or capital surplus, or land, bldg , and equipment fund	0	0	
	29	Retained earnings, accumulated income, endowment, or other funds	0	0	
	30	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	65,104,855	65,389,769	
	31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	65,104,855	65,389,769	

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	65,104,855
2	Enter amount from Part I, line 27a . . . . .	2	284,914
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3 . . . . .	4	65,389,769
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	65,389,769

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			(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a 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	3,260,362
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))
2012	2,922,012	67,351,876	0 043384
2011	2,591,500	65,883,457	0 039335
2010	4,011,031	58,529,230	0 068530
2009	2,744,750	56,534,960	0 048550
2008	1,087,095	56,580,555	0 019213

2	Total of line 1, column (d). . . . .	2	0 219012
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 043802
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5. . . . .	4	66,581,066
5	Multiply line 4 by line 3. . . . .	5	2,916,384
6	Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	44,302
7	Add lines 5 and 6. . . . .	7	2,960,686
8	Enter qualifying distributions from Part XII, line 4. . . . . If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	4,140,500

<b>Part VI    Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)</b>		
<b>1a</b> Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
<b>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 . . . . .	<b>1</b>	44,302
<b>c</b> All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
<b>2</b> Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	0
<b>3</b> Add lines 1 and 2. . . . .	<b>3</b>	44,302
<b>4</b> Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	0
<b>5</b> <b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	<b>5</b>	44,302
<b>6</b> Credits/Payments		
<b>a</b> 2013 estimated tax payments and 2012 overpayment credited to 2013	<b>6a</b>	66,772
<b>b</b> Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>	
<b>c</b> Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	
<b>d</b> Backup withholding erroneously withheld . . . . .	<b>6d</b>	
<b>7</b> Total credits and payments. Add lines 6a through 6d. . . . .	<b>7</b>	66,772
<b>8</b> Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b> <b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	<b>9</b>	
<b>10</b> <b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	<b>10</b>	22,470
<b>11</b> Enter the amount of line 10 to be <b>Credited to 2014 estimated tax</b> <input checked="" type="checkbox"/> 22,470 <b>Refunded</b> <input checked="" type="checkbox"/>	<b>11</b>	0

<b>Part VII-A    Statements Regarding Activities</b>			
<b>1a</b> 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? . . . . .	<b>1a</b>	Yes	No
<b>b</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>	<b>1b</b>		No
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?. . . . .	<b>1c</b>		No
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: <b>(1)</b> On the foundation <input checked="" type="checkbox"/> \$ 0 <b>(2)</b> On foundation managers <input checked="" type="checkbox"/> \$ 0			
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0			
<b>2</b> 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>	<b>2</b>		No
<b>3</b> 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> . . . . .	<b>3</b>		No
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?. . . . .	<b>4a</b>		No
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?. . . . .	<b>4b</b>		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . <i>If "Yes," attach the statement required by General Instruction T.</i>	<b>5</b>		No
<b>6</b> 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? . . . . .	<b>6</b>	Yes	
<b>7</b> 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>	<b>7</b>	Yes	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions): <input checked="" type="checkbox"/> IL			
<b>b</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>	<b>8b</b>	Yes	
<b>9</b> 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)? <i>If "Yes," complete Part XIV</i> . . . . .	<b>9</b>		No
<b>10</b> Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	<b>10</b>		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 ▶SARAH KIRK Telephone no ▶(312) 477-7603 Located at ▶155 N WACKER DRIVE STE 840 CHICAGO IL ZIP +4 ▶60606			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶	15		
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	Yes	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

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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> 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)?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days ). . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> 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)?. . . Organizations relying on a current notice regarding disaster assistance check here. . . . . ▶ <input type="checkbox"/>	1b		
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is <b>not</b> 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 <b>all</b> years listed, answer "No" and attach statement—see instructions ). . . . .	2b		
c	If the provisions of section 4942(a)(2) are being applied to <b>any</b> 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?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i> ). . . . .	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 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))?		<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	
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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> 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?		<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	
b If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		7b		

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LEONARD H LAVIN	PRESIDENT	0	0	0
5001 SW 27TH AVENUE OCALA, FL 34474	0 50			
CAROL L BERNICK	VICE PRESIDENT	0	0	0
155 N WACKER DRIVE STE 840 CHICAGO, IL 60606	0 50			
2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				
Total number of other employees paid over \$50,000.				0

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services. . . . .		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
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	0
Total. Add lines 1 through 3. . . . .	0



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	63,165,586
b	Average of monthly cash balances. . . . .	1b	4,429,405
c	Fair market value of all other assets (see instructions). . . . .	1c	0
d	Total (add lines 1a, b, and c). . . . .	1d	67,594,991
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation). . . . .	1e	0
2	Acquisition indebtedness applicable to line 1 assets. . . . .	2	0
3	Subtract line 2 from line 1d. . . . .	3	67,594,991
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	1,013,925
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	66,581,066
6	Minimum investment return. Enter 5% of line 5. . . . .	6	3,329,053

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	3,329,053
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a	44,302
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	44,302
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	3,284,751
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	3,284,751
6	Deduction from distributable amount (see instructions). . . . .	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7	3,284,751

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	4,140,500
b	Program-related investments—total from Part IX-B. . . . .	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes. . . . .	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required). . . . .	3a	
b	Cash distribution test (attach the required schedule). . . . .	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	4,140,500
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	44,302
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	4,096,198
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				3,284,751
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only. . . . .			1,129,047	
b Total for prior years 20__, 20__, 20__		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008. . . . .				
b From 2009. . . . .				
c From 2010. . . . .				
d From 2011. . . . .				
e From 2012. . . . .				
f Total of lines 3a through e. . . . .	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 4,140,500				
a Applied to 2012, but not more than line 2a			1,129,047	
b Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
c Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
d Applied to 2013 distributable amount. . . . .				3,011,453
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0			
b Prior years' undistributed income Subtract line 4b from line 2b. . . . .		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .		0		
d Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 . . . . .				273,298
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .	0			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				
c Excess from 2011. . . .				
d Excess from 2012. . . .				
e Excess from 2013. . . .				

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)

☐ 4942(j)(3) ☐ 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.	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
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) )

LEONARD H LAVIN

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

LEONARD H LAVIN  
5001 SW 27TH AVE  
OCALA,FL 34474  
(708) 450-3434

b

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

THERE IS NO SPECIAL FORM. A LETTER REQUESTING A DONATION IS ACCEPTABLE

c

Any submission deadlines

NO SUBMISSION DEADLINES

d

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

NO RESTRICTIONS OR LIMITATIONS

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)				
a Paid during the year See Additional Data Table				
Total . . . . .			3a	4,140,500
b Approved for future payment				
Total . . . . .			3b	0

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)



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 )
MERRILL LYNCH 7DQ-02299 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 7DQ-02299 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02482 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02482 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02483 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02483 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02496 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02496 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02501 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02501 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02502 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02502 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02503 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-02503 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04321 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04321 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04322 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04322 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04323 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04323 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04324 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04324 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04325 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04325 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04326 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04326 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04327 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04327 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04328 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04328 (DETAILS AVAILABLE UPON REQUEST)	P		

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 )
MERRILL LYNCH 6CW-04329 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH 6CW-04329 (DETAILS AVAILABLE UPON REQUEST)	P		
MERRILL LYNCH CAPITAL GAIN DISTRIBUTION	P		
MERRILL LYNCH SECTION 1250 GAIN	P		



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)
569,390		565,656	3,734
9,621,978		9,674,826	-52,848
2,384,284		2,300,971	83,313
291,649		251,149	40,500
2,202,856		2,207,946	-5,090
447,488		390,851	56,637
3,552,135		3,212,291	339,844
1,558,333		1,175,761	382,572
3,901,834		3,634,696	267,138
1,579,035		1,234,229	344,806
1,719,117		1,619,862	99,255
800,632		624,964	175,668
1,081,578		1,037,905	43,673
793,482		682,403	111,079
498,535		510,014	-11,479
1,790,483		1,659,209	131,274
1,526,980		1,503,618	23,362
2,143,240		1,738,337	404,903
694,865		673,014	21,851
802,491		674,205	128,286
630,380		584,152	46,228
295,079		233,518	61,561
108,293		106,621	1,672
138,678		104,860	33,818
93,268		78,542	14,726
198,453		142,306	56,147
405,494		369,509	35,985
817,365		692,852	124,513
678,403		630,825	47,578
1,069,660		960,721	108,939

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)
153,647		149,778	3,869
752,497		634,909	117,588
16,577			16,577
2,683			2,683


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	
			3,734
			-52,848
			83,313
			40,500
			-5,090
			56,637
			339,844
			382,572
			267,138
			344,806
			99,255
			175,668
			43,673
			111,079
			-11,479
			131,274
			23,362
			404,903
			21,851
			128,286
			46,228
			61,561
			1,672
			33,818
			14,726
			56,147
			35,985
			124,513
			47,578
			108,939


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	
			3,869
			117,588
			16,577
			2,683


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</b> <i>Paid during the year</i>				
ICAP 201 OCEAN AVE STE 1708P SANTA MONICA,CA 90402	NONE	PC	CONTRIBUTION	100,000
FOOD FOR THE POOR 6401 LYONS RD COCONUT CREEK,FL 33703	NONE	PC	CONTRIBUTION	1,000
ILLINOIS HOLOCAUST MUSEUM 9603 WOODS DRIVE SKOKIE,IL 60077	NONE	PC	CONTRIBUTION	25,000
CHILDREN'S HOME AID 125 S WACKER DRIVE 14TH FLOOR CHICAGO,IL 60606	NONE	PC	CONTRIBUTION	10,000
OUNCE OF PREVENTION FUND 33 W MONROE STREET STE 2400 CHICAGO,IL 60603	NONE	PC	CONTRIBUTION	10,000
MUSIC INSTITUTE OF CHICAGO 517 GREEN BAY ROAD WILMETTE,IL 60091	NONE	PC	CONTRIBUTION	5,500
THOROUGHbred AFTERCARE ALLIANCE FOUNDATION 821 CORPORATE DRIVE LEXINGTON,KY 40503	NONE	PC	CONTRIBUTION	50,000
THE LINCOLN ACADEMY OF ILLINOIS 209 S 6TH STREET SPRINGFIELD,IL 62701	NONE	PC	CONTRIBUTION	2,000
HARVARD UNIVERSITY 79 JOHN F KENNEDY STREET CAMBRIDGE,MA 02138	NONE	PC	CONTRIBUTION	10,000
UNITED STATES HOLOCAUST MUSEUM PO BOX 1352 HIGHLAND PARK,IL 60035	NONE	PC	CONTRIBUTION	15,000
OAK PARK TEMPLE 1235 N HARLEM AVE OAK PARK,IL 60302	NONE	PC	CONTRIBUTION	25,000
THE CHICAGO HIGH SCHOOL FOR THE ARTS 521 E 35TH STREET CHICAGO,IL 60616	NONE	PC	CONTRIBUTION	2,500
TRINITY HIGH SCHOOL 7574 W DIVISION STREET RIVER FOREST,IL 60305	NONE	PC	CONTRIBUTION	15,000
LEWIS UNIVERSITY ONE UNIVERSITY PARKWAY ROMEOVILLE,IL 60446	NONE	PC	CONTRIBUTION	20,000
SHINING STAR BALL 1835 WEST CENTRAL ROAD ARLINGTON HEIGHTS,IL 60005	NONE	PC	CONTRIBUTION	5,000
<b>Total . . . . .</b>  <b>3a</b>				4,140,500


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</b> <i>Paid during the year</i>				
NORTHWESTERN HOSPITAL 251 EAST HURON ST CHICAGO,IL 60611	NONE	PC	CONTRIBUTION	50,000
UNIVERSITY OF PENNSYLVANIA 3451 WALNUT STREET PHILADELPHIA,PA 19104	NONE	PC	CONTRIBUTION	100,000
SCRIPPS - CARDIOLOGY 9888 GENESEE AVE LA JOLLA,CA 92037	NONE	PC	CONTRIBUTION	100,000
UNIVERSITY OF WASHINGTON 1410 NE CAMPUS PARKWAY SEATTLE,WA 98195	NONE	PC	CONTRIBUTION	200,000
GILDA'S CLUB CHICAGO 205 WEST WACKER DRIVE SUITE 1400 CHICAGO,IL 60606	NONE	PC	CONTRIBUTION	2,000
AMERICAN HEARTAMERICAN STROKE ASSOC 6800 W 93RD STREET OVERLAND PARK,KS 66212	NONE	PC	CONTRIBUTION	10,000
THE LEUKEMIA AND LYMPHOMA SOCIETY PO BOX 4072 PITTSFIELD,MA 01202	NONE	PC	CONTRIBUTION	50,000
US NAVY MEMORIAL 701 PENNSYLVANIA AVE NW WASHINGTON,DC 20004	NONE	PC	CONTRIBUTION	500
US NAVY MEMORIAL 701 PENNSYLVANIA AVE NW WASHINGTON,DC 20004	NONE	PC	CONTRIBUTION	5,000
USO OF ILLINOIS 10000 WEST OHARE AVENUE CHICAGO,IL 60666	NONE	PC	CONTRIBUTION	10,000
WTTW11 5400 N ST LOUIS AVE CHICAGO,IL 60625	NONE	PC	CONTRIBUTION	5,000
JUNIOR ACHIEVEMENT OF CHICAGO 651 W WASHINGTON BLVD CHICAGO,IL 60661	NONE	PC	CONTRIBUTION	7,500
EQUESTRIAN CONNECTION NFP 600 N BRADLEY RD LAKE FOREST,IL 60045	NONE	PC	CONTRIBUTION	2,000
ART INSTITUTE OF CHICAGO 111 S MICHIGAN AVE CHICAGO,IL 60603	NONE	PC	CONTRIBUTION	25,000
THE SALVATION ARMY 615 SLATERS LANE PO BOX 269 ALEXANDRIA,VA 22313	NONE	PC	CONTRIBUTION	10,000
<b>Total . . . . .</b>  <b>3a</b>				4,140,500

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</b> Paid during the year				
AMERICAN RED CROSS 2200 W HARRISON ST CHICAGO,IL 60612	NONE	PC	CONTRIBUTION	20,000
CHICAGO BOTANIC GARDEN 1000 LAKE COOK RD GLENCOE,IL 60022	NONE	PC	CONTRIBUTION	100,000
SCRIPPS HEALTH FOUNDATION 9888 GENESEE AVE LA JOLLA,CA 92037	NONE	PC	CONTRIBUTION	500,000
NORTHWESTERN MEMORIAL FOUNDATION 251 EAST HURON ST SUITE 3-708 CHICAGO,IL 606112908	NONE	PC	CONTRIBUTION	1,000,000
OAK PARK TEMPLE 1235 N HARLEM AVE OAK PARK,IL 60302	NONE	PC	CONTRIBUTION	25,000
CHILDREN'S HOME AID 125 S WACKER DRIVE 14TH FLOOR CHICAGO,IL 60606	NONE	PC	CONTRIBUTION	5,000
ALZHEIMER'S DRUG DISCOVERY FOUNDATION 57 WEST 57TH STREET SUITE 904 NEWYORK,NY 10019	NONE	PC	CONTRIBUTION	10,000
AFTER SCHOOL MATTERS 66 EAST RANDOLPH ST CHICAGO,IL 60601	NONE	PC	CONTRIBUTION	5,000
EVANS SCHOLARS ONE BRIAR ROAD GOLF,IL 60029	NONE	PC	CONTRIBUTION	30,000
COALITION TO SALUTE AMERICA'S HEROES PO BOX 96440 WASHINGTON,DC 20090	NONE	PC	CONTRIBUTION	5,000
THE CAMPANILE FOUNDATION 5500 CAMPANILE DRIVE SAN DIEGO,CA 92182	NONE	PC	CONTRIBUTION	1,000,000
LYRIC OPERA OF CHICAGO 20 N WACKER DRIVE CHICAGO,IL 60606	NONE	PC	CONTRIBUTION	5,000
PATHWAYS FOUNDATION 150 N MICHIGAN AVE SUITE 2100 CHICAGO,IL 60601	NONE	PC	CONTRIBUTION	5,000
MARINE CORPS SCHOLARSHIP FOUNDATION 909 N WASHINGTON STREET SUITE 400 ALEXANDRIA,VA 22314	NONE	PC	CONTRIBUTION	15,000
THE FIELD MUSEUM 1400 S LAKE SHORE DRIVE CHICAGO,IL 60605	NONE	PC	CONTRIBUTION	10,000
<b>Total . . . . .</b>  <b>3a</b>				4,140,500

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</b> Paid during the year				
MUSEUM OF SCIENCE & INDUSTRY 5700 S LAKE SHORE DRIVE CHICAGO,IL 60637	NONE	PC	CONTRIBUTION	10,000
CHICAGO SYMPHONY ORCHESTRA 220 S MICHIGAN AVE CHICAGO,IL 60604	NONE	PC	CONTRIBUTION	10,000
CHILDREN'S ONCOLOGY SERVICES 213 WEST INSTITUTE PLACE CHICAGO,IL 60610	NONE	PC	CONTRIBUTION	7,500
VACATIONS FOR VETERANS 9435 LORTON MARKET STREET LORTON,VA 22079	NONE	PC	CONTRIBUTION	10,000
MUSICORPS RIME 5001 SW 27TH AVE OCALA,FL 34474	NONE	PC	CONTRIBUTION	10,000
CHICAGO SISTER CITIES INTERNATIONAL 177 N STATE ST STE 500 CHICAGO,IL 60601	NONE	PC	CONTRIBUTION	5,000
SUN TIMES CHARITY TRUST 350 N ORLEANS STREET 10TH FLOOR CHICAGO,IL 60610	NONE	PC	CONTRIBUTION	5,000
BRAIN RESEARCH FOUNDATION 111 W WASHINGTON ST SUITE 1710 CHICAGO,IL 60602	NONE	PC	CONTRIBUTION	5,000
TULANE UNIVERSITY 1555 POYDRAS STREET SUITE 1000 NEW ORLEANS,LA 70112	NONE	PC	CONTRIBUTION	200,000
PROVIDENCE ST MEL SCHOOL 119 S CENTRAL PARK BLVD CHICAGO,IL 60624	NONE	PC	CONTRIBUTION	10,000
THE FAMILY INSTITUTE AT NORTHWESTERN UNIVERSITY 8 S MICHIGAN AVE SUITE 500 CHICAGO,IL 60603	NONE	PC	CONTRIBUTION	50,000
THE FIRST CONGREGATIONAL CHURCH OF RIDGEFIELD WEST LANE RIDGEFIELD,CT 06877	NONE	PC	CONTRIBUTION	6,250
ACCESS LIVING 115 W CHICAGO AVE CHICAGO,IL 60654	NONE	PC	CONTRIBUTION	6,250
COMMUNITY HEALTH 2611 W CHICAGO AVE CHICAGO,IL 60622	NONE	PC	CONTRIBUTION	6,250
UNIVERSITY OF NOTRE DAME CENTER FOR SOCIAL CONCERN GEDDES HALL BUILDING 1212 NOTRE DAME,IN 46556	NONE	PC	CONTRIBUTION	6,250
<b>Total . . . . .</b>  <b>3a</b>				4,140,500



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</b> <i>Paid during the year</i>				
JEWISH UNITED FUND 30 S WELLS STREET CHICAGO,IL 60606	NONE	PC	CONTRIBUTION	100,000
JEWISH FEDERATION OF METROPOLITAN CHICAGO 30 S WELLS STREET CHICAGO,IL 60606	NONE	PC	CONTRIBUTION	50,000
SHEDD AQUARIUM 1200 S LAKE SHORE DRIVE CHICAGO,IL 60605	NONE	PC	CONTRIBUTION	10,000
NORTHWESTERN FEINBERG SCHOOL OF MEDICINE 303 E CHICAGO AVE CHICAGO,IL 60611	NONE	PC	CONTRIBUTION	25,000
<b>Total . . . . .</b>			<b>▶ 3a</b>	4,140,500

**TY 2013 All Other Program  
Related Investments Schedule**

**Name:** LAVIN FAMILY FOUNDATION

**EIN:** 36-6106074

Category	Amount
NONE	0

**TY 2013 Investments Corporate  
Bonds Schedule**

**Name:** LAVIN FAMILY FOUNDATION  
**EIN:** 36-6106074

Name of Bond	End of Year Book Value	End of Year Fair Market Value
MERRILL LYNCH 7DQ-02299	15,547,922	15,532,294

**TY 2013 Investments Corporate  
Stock Schedule**

**Name:** LAVIN FAMILY FOUNDATION  
**EIN:** 36-6106074

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MERRILL LYNCH 6CW-04317	37,003,427	42,304,043

**TY 2013 Investments Government  
Obligations Schedule****Name:** LAVIN FAMILY FOUNDATION**EIN:** 36-6106074**US Government Securities - End of  
Year Book Value:**

7,000,000

**US Government Securities - End of  
Year Fair Market Value:**

6,297,090

**State & Local Government  
Securities - End of Year Book  
Value:**

0

**State & Local Government  
Securities - End of Year Fair  
Market Value:**

0

# TY 2013 Other Expenses Schedule

**Name:** LAVIN FAMILY FOUNDATION

**EIN:** 36-6106074

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT MGMT FEES	370,283	369,638		0

# TY 2013 Other Professional Fees Schedule

**Name:** LAVIN FAMILY FOUNDATION

**EIN:** 36-6106074

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PROFESSIONAL FEES	5,368	5,368		0

# TY 2013 Taxes Schedule

**Name:** LAVIN FAMILY FOUNDATION

**EIN:** 36-6106074

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAXES	23,413	21,314		0