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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 06-01-2013 , and ending 05-31-2014

Name of foundation Max and Anna Levinson Foundation		<b>A Employer identification number</b>  23-6282844	
Number and street (or P O box number if mail is not delivered to street address) PO Box 6309		<b>B Telephone number</b> (see instructions)  (505) 986-8608	
City or town, state or province, country, and ZIP or foreign postal code Santa Fe, NM 87502		<b>C</b> If exemption application is pending, check here <input type="checkbox"/>	
<b>G</b> Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		<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 checked="" type="checkbox"/> \$ 16,261,435		<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 type="checkbox"/> Cash <input checked="" 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				
	4 Dividends and interest from securities. . . . .	435,499	435,499		
	5a Gross rents . . . . .				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	357,302			
	b Gross sales price for all assets on line 6a 2,003,757				
	7 Capital gain net income (from Part IV, line 2) . . .		357,302		
	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 . . . . .	792,801	792,801		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	148,000			148,000
	14 Other employee salaries and wages . . . . .	6,250			6,250
	15 Pension plans, employee benefits . . . . .				
	16a Legal fees (attach schedule) . . . . .				
	b Accounting fees (attach schedule) . . . . .	 8,184			8,184
	c Other professional fees (attach schedule) . . . . .				
	17 Interest . . . . .				
	18 Taxes (attach schedule) (see instructions)	 45,882			8,288
	19 Depreciation (attach schedule) and depletion . . .				
	20 Occupancy . . . . .				
	21 Travel, conferences, and meetings . . . . .				
	22 Printing and publications . . . . .				
	23 Other expenses (attach schedule) . . . . .	 153,916	72,863		81,053
	24 <b>Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	362,232	72,863		251,775
	25 Contributions, gifts, grants paid . . . . .	1,184,340			1,184,340
	26 <b>Total expenses and disbursements.</b> Add lines 24 and 25	1,546,572	72,863		1,436,115
	27 Subtract line 26 from line 12				
	a <b>Excess of revenue over expenses and disbursements</b>	-753,771			
	b <b>Net investment income</b> (if negative, enter -0-)		719,938		
	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 . . . . .	41,177	87,327	87,327
	2	Savings and temporary cash investments . . . . .			
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable . . . . .			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see 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)	2,124,317	 1,809,102	1,931,623
	b	Investments—corporate stock (attach schedule) . . . . .	8,309,929	 8,382,090	13,567,116
	c	Investments—corporate bonds (attach schedule). . . . .			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans . . . . .			
	13	Investments—other (attach schedule) . . . . .	1,140,098	 613,843	613,843
	14	Land, buildings, and equipment basis ▶ _____ 30,833 Less accumulated depreciation (attach schedule) ▶ _____ 30,833			
15	Other assets (describe ▶ _____)	 60,063	 61,526	 61,526	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	11,675,584	10,953,888	16,261,435	
Liabilities	17	Accounts payable and accrued expenses . . . . .	543	2,824	
	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 ▶ _____)	 81,857	 106,151	
	23	Total liabilities (add lines 17 through 22) . . . . .	82,400	108,975	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.				
	24	Unrestricted . . . . .	11,593,184	10,844,913	
	25	Temporarily restricted . . . . .			
	26	Permanently restricted . . . . .			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.				
	27	Capital stock, trust principal, or current funds . . . . .			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions) . . . . .	11,593,184	10,844,913	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	11,675,584	10,953,888	

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	11,593,184
2	Enter amount from Part I, line 27a . . . . .	2	-753,771
3	Other increases not included in line 2 (itemize) ▶ _____ 	3	5,500
4	Add lines 1, 2, and 3 . . . . .	4	10,844,913
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	10,844,913

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 )
1 a	See attached statement	P	2014-01-01	2014-01-02
b	See attached statement	P	2011-01-01	2014-01-02
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 657,589		600,945	56,644
b 1,346,168		1,045,510	300,658
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			56,644
b			300,658
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	357,302
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	56,644

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	1,428,916	15,735,864	0 09081
2011	799,744	14,218,788	0 05625
2010	799,372	14,376,989	0 05560
2009	511,955	13,109,282	0 03905
2008	569,208	13,273,067	0 04288

2 Total of line 1, column (d). . . . .	2	0 28459
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 05692
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5. . . . .	4	15,735,864
5 Multiply line 4 by line 3. . . . .	5	895,654
6 Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	7,199
7 Add lines 5 and 6. . . . .	7	902,853
8 Enter qualifying distributions from Part XII, line 4. . . . .	8	1,436,115

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

<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>	7,199
<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>	
<b>3</b> Add lines 1 and 2. . . . .	<b>3</b>	7,199
<b>4</b> Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	
<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>	7,199
<b>6</b> Credits/Payments		
<b>a</b> 2013 estimated tax payments and 2012 overpayment credited to 2013	<b>6a</b>	12,414
<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>	12,414
<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>	5,215
<b>11</b> Enter the amount of line 10 to be <b>Credited to 2014 estimated tax</b> <input checked="" type="checkbox"/> <b>Refunded</b> <input checked="" type="checkbox"/>	<b>11</b>	5,215

<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>	<b>Yes</b>	<b>No</b>
<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>		<b>No</b>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?. . . . .	<b>1c</b>		<b>No</b>
<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"/> \$ _____ <b>(2)</b> On foundation managers <input checked="" type="checkbox"/> \$ _____			
<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"/> \$ _____			
<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>		<b>No</b>
<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>		<b>No</b>
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year?. . . . .	<b>4a</b>		<b>No</b>
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?. . . . .	<b>4b</b>		<b>No</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>		<b>No</b>
<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>		<b>No</b>
<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>	<b>Yes</b>	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions): <input checked="" type="checkbox"/> NM _____			
<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>	<b>Yes</b>	
<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>		<b>No</b>
<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>		<b>No</b>

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? Website address ▶Levinsonfoundation.org	13	Yes	
14	The books are in care of ▶Corporate offices Located at ▶PO Box 6309 Santa Fe NM Telephone no ▶(505) 995-8802 ZIP +4 ▶87502			
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? See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶	16	Yes	No

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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No (6) Agree to pay money or property to a government official? ( <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		No
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		No
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		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
See Additional Data Table				

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. ☒

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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	15,133,814
b	Average of monthly cash balances. . . . .	1b	166,313
c	Fair market value of all other assets (see instructions). . . . .	1c	675,369
d	Total (add lines 1a, b, and c). . . . .	1d	15,975,496
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	15,975,496
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4	239,632
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	15,735,864
6	Minimum investment return. Enter 5% of line 5. . . . .	6	786,793

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	786,793
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a	7,199
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	7,199
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	779,594
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	
5	Add lines 3 and 4. . . . .	5	779,594
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	779,594

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	1,436,115
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	1,436,115
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	7,199
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	1,428,916
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				779,594
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. . . . .				
c From 2010. . . . .				92,213
d From 2011. . . . .				96,389
e From 2012. . . . .				309,392
f Total of lines 3a through e. . . . .	497,994			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 1,436,115				
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. . . . .				779,594
e Remaining amount distributed out of corpus	656,521			
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	1,154,515			
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 . . . . .	1,154,515			
10 Analysis of line 9				
a Excess from 2009. . . .				
b Excess from 2010. . . .				92,213
c Excess from 2011. . . .				96,389
d Excess from 2012. . . .				309,392
e Excess from 2013. . . .				656,521

Part XIVPrivate 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) or ☐ 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 XVSupplementary 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 of the person to whom applications should be addressed

b

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

c

Any submission deadlines

d

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

Form 990-PF (2013)

### 3 Grants and Contributions Paid During the Year or Approved for Future Payment

Form **990-PF** (2013)

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 VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation**

<b>(a)</b> Name and address	<b>(b)</b> Title, and average hours per week devoted to position	<b>(c)</b> Compensation <b>(If not paid, enter -0-)</b>	<b>(d)</b> Contributions to employee benefit plans and deferred compensation	<b>(e)</b> Expense account, other allowances
Ed Levinson	Director 2 00	3,000		
PO Box 237 Mill Valley, CA 94942				
Charlotte Levinson	President 40 00	121,000		
PO Box 6309 Santa Fe, NM 875026309				
Gordon Levinson	Director 2 00	3,000		
7337 Corte Tomillo Carlsbad, CA 92009				
Peter Gabel	Director 2 00	3,000		
386 Elizabeth St San Francisco, CA 94114				
Rachel Krich	Treasurer 2 00	3,000		
2 Schweid Ct Fair Lawn, NJ 07410				
Robin Beck	Vice President 2 00	3,000		
PO Box 6309 Santa Fe, NM 875026309				
Julian Levinson	Director 2 00	3,000		
292 Riverside Dr Apt 4A New York, NY 10025				
Suntara Loba	Director 2 00	3,000		
PO Box 6309 Santa Fe, NM 87505				
Carol Doroshow	Secretary 2 00	3,000		
8246 4th Ave NE Seattle, WA 98115				
Kris Murphey	Secretary 8 00	3,000		
2502 Alamosa Place Santa Fe, NM 87505				

## TY 2013 Accounting Fees Schedule

**Name:** Max and Anna Levinson Foundation

**EIN:** 23-6282844

**Software ID:** 13000170

**Software Version:** 2013v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Bookkeeping and tax compliance	8,184	0	0	8,184



**TY 2013 Investments Corporate  
Stock Schedule****Name:** Max and Anna Levinson Foundation**EIN:** 23-6282844**Software ID:** 13000170**Software Version:** 2013v4.0

<b>Name of Stock</b>	<b>End of Year Book Value</b>	<b>End of Year Fair Market Value</b>
Corporate Dept Securities	1,407,309	1,447,346
Financials	1,183,698	1,905,856
Mutual Funds	517,062	893,053
Consumer Non-Durables	1,112,354	2,007,482
Consumer Services	743,606	1,268,252
Utilities	2,644	2,846
Business products & services	854,445	1,642,944
Capital Goods	1,065,348	2,153,914
Basic Industries	299,540	529,229
Transportation	265,141	391,236
Consumer Durables	88,058	161,421
Foreign Assets	842,885	1,163,537
Industrial Electronics		

# TY 2013 Investments Government Obligations Schedule

**Name:** Max and Anna Levinson Foundation

**EIN:** 23-6282844

**Software ID:** 13000170

**Software Version:** 2013v4.0

<b>US Government Securities - End of Year Book Value:</b>	1,709,102
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<b>US Government Securities - End of Year Fair Market Value:</b>	1,824,163
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<b>State &amp; Local Government Securities - End of Year Book Value:</b>	100,000
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<b>State &amp; Local Government Securities - End of Year Fair Market Value:</b>	107,460
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**TY 2013 Investments - Other Schedule**

**Name:** Max and Anna Levinson Foundation

**EIN:** 23-6282844

**Software ID:** 13000170

**Software Version:** 2013v4.0

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Money Market	AT COST	613,843	613,843

TY 2013 Land, Etc. Schedule

**Name:** Max and Anna Levinson Foundation

**EIN:** 23-6282844

**Software ID:** 13000170

**Software Version:** 2013v4.0

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Furniture and Fixtures	30,833	30,833		

TY 2013 Other Assets Schedule

**Name:** Max and Anna Levinson Foundation

**EIN:** 23-6282844

**Software ID:** 13000170

**Software Version:** 2013v4.0

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
Accrued interest	60,063	61,526	61,526

**TY 2013 Other Expenses Schedule****Name:** Max and Anna Levinson Foundation**EIN:** 23-6282844**Software ID:** 13000170**Software Version:** 2013v4.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Amortization	8,483			8,483
Board Meetings	17,835			17,835
Conferences	9,448			9,448
Dues, Subscriptions	1,241			1,241
Employee benefits	26,998			26,998
Insurance	2,661			2,661
Internet & Telephone	4,259			4,259
Investment & bank fees	72,863	72,863		
Office supplies	8,369			8,369
Postage	1,318			1,318
Storage	441			441

TY 2013 Other Increases Schedule

**Name:** Max and Anna Levinson Foundation

**EIN:** 23-6282844

**Software ID:** 13000170

**Software Version:** 2013v4.0

Description	Amount
Voided checks	5,500

**TY 2013 Other Liabilities Schedule****Name:** Max and Anna Levinson Foundation**EIN:** 23-6282844**Software ID:** 13000170**Software Version:** 2013v4.0

Description	Beginning of Year - Book Value	End of Year - Book Value
Deferred Federal Excise Tax	81,857	106,151



**TY 2013 Taxes Schedule****Name:** Max and Anna Levinson Foundation**EIN:** 23-6282844**Software ID:** 13000170**Software Version:** 2013v4.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
Excise taxes	37,594			
Payroll taxes	8,288			8,288

MAX & ANNA LEVINSON FNDN ENDOW IMA 1-01927  
Schedule D Detail of Short-term Capital Gains and Losses

[illegible]

MAX & ANNA LEVINSON FNDN ENDOW IMA 1-01927  
Schedule D Detail of Long-term Capital Gains and Losses

Description	Date Acquired	Date Sold	Gross Sales Price	Cost or Other Basis	Long-term Gain/Loss
2100 NETAPP INC	VAR	06/12/2013	81,224.06	81,584.82	-360.76
575. BARD C R CO COM	VAR	06/17/2013	63,441.86	51,889.16	11,552.70
725. WATERS CORP COM	VAR	06/17/2013	72,778.07	54,607.24	18,170.83
2621.919 WALDEN SMALL CAP INNOVATIONS FUND	10/14/2009	06/18/2013	50,000.00	35,081.27	14,918.73
200. ORACLE CORP COM	06/14/2012	06/18/2013	6,881.90	5,416.00	1,465.90
106665. US TSY INFL IDX NTS 1.25%	08/17/2010	06/19/2013	119,514.80	111,778.48	7,736.32
445. AUTOLIV INC	03/15/2012	10/01/2013	39,140.71	30,504.79	8,635.92
1200. NIKE INC CL B COM	VAR	10/01/2013	86,930.67	43,321.68	43,608.99
1800. EXPEDITORS INTL WASH INC COM	03/29/2012	10/28/2013	83,571.82	82,825.74	746.08
2000. INTEL CORP	06/22/2012	10/28/2013	48,562.75	53,700.00	-5,137.25
3200. SYSCO CORP	VAR	10/28/2013	106,672.69	95,466.97	11,205.72
25. GOOGLE INC-A	06/14/2012	03/04/2014	30,339.72	14,000.75	16,338.97
585. TIME WARNER CABLE INC	VAR	03/04/2014	81,890.50	35,999.25	45,891.25
200. AMERICAN EXPRESS CO	VAR	05/19/2014	17,528.30	13,518.94	4,009.34
50. APPLE COMPUTER INC COM	06/14/2012	05/19/2014	30,264.83	28,563.50	1,701.33
250. BB&T CORP COM	04/30/2013	05/19/2014	9,252.92	7,682.38	1,570.54
1708.267 WALDEN SMALL CAP INNOVATIONS FUND	10/14/2009	05/19/2014	33,106.21	22,856.61	10,249.60
150. CHUBB CORP COM	04/30/2013	05/19/2014	13,892.71	13,168.49	724.22
250. CINCINNATI FINL CORP COM	04/30/2013	05/19/2014	12,172.26	12,072.48	99.78
300. CISCO SYSTEMS INC	04/30/2013	05/19/2014	7,233.34	6,296.85	936.49
100. COLGATE-PALMOLIVE COMPANY	06/14/2012	05/19/2014	6,646.86	5,027.50	1,619.36
300. COSTCO WHOLESALE CORP	06/14/2002	05/19/2014	34,511.26	11,814.07	22,697.19
100. DEERE & CO COM	06/22/2012	05/19/2014	9,079.80	7,552.23	1,527.57
500. DONALDSON INC COM	VAR	05/19/2014	21,256.22	16,016.65	5,239.57
500. E M C CORP MASS	12/12/2012	05/19/2014	13,059.71	12,484.75	574.96
50. INTL BUSINESS MACHINES CORP CAP	06/14/2012	05/19/2014	9,320.79	9,656.50	-335.71
300. J P MORGAN CHASE & CO COM	04/30/2013	05/19/2014	15,986.67	14,660.97	1,325.70
200. LINCOLN ELECTRIC HOLDINGS	05/21/2010	05/19/2014	13,253.72	5,299.03	7,954.69
200. MEDTRONIC INC COM	06/12/2001	05/19/2014	12,113.85	8,836.60	3,277.25
125. METTLER-TOLEDO INTL INC COM	VAR	05/19/2014	30,469.32	18,191.26	12,278.06
200. MICROSOFT CORP COM	02/10/2012	05/19/2014	7,918.16	6,164.78	1,753.38
<b>Totals</b>					

JSA  
3F0970 1 000

MAX & ANNA LEVINSON FNDN ENDOW IMA 1-01927  
Schedule D Detail of Long-term Capital Gains and Losses

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JSA  
3F0970 1,000

<u>New Organizing Institute Education</u>	1133 19th St. NW	Washington	DC	20036	
Conference on spirit, law, politics		ck # 6738		4/25/2014	\$ 2000
<u>Borneo/Earth Island Institute</u>	2150 Allston Way	Berkeley	CA	94704	
The Borneo Project		ck # 6739		4/25/2014	\$ 5,450
<u>Pinyon Foundation</u>	c/o FNBSF, POB	Santa Fe	NM	87504	
Jim Terr Video Project		ck # 6741		5/15/2014	\$ 1000
<u>Colele Chabad</u>	806 Eastern	Brooklyn	NY	11213	
Food for impoverished Israelis		ck # 6742		5/16/2014	\$ 1,000
<u>Media Alliance</u>	1904 Franklin	Oakland	CA	94612	
Making of a Dream		ck # 6743		5/16/2014	\$ 3000
<u>Stroum Jewish Community Center</u>	2618 NE 80th St.	Seattle	WA	98115	
Seattle Jewish Film Festival		ck # 6745		5/18/2014	\$ 5,000
<u>Coal River Mountain Watch</u>	POB 274	Naoma	WV	25140	
health crisis in mountaintop removal communities		ck # 6679		5/27/2014	\$ 10000
<u>SELF Sudan</u>	911 De La Vina	Santa Barbara	CA	93101	
Building schools		ck # 6749		5/28/2014	\$ 500
<u>The Art Barge</u>	POB 1266	Amagansett	NY	11930	
Kids art program		ck # 6572		6/3/2013	\$ 2,000
<u>826 Michigan</u>	115 E. Liberty St.	Ann Arbor	MI	48104	
Youth writing program		ck # 6580		6/13/2013	\$ 2000
<u>Rancho Bernardo Highschool</u>	13010 Paseo Lucido	San Diego	CA	92128	
Sports program		ck # 6823		6/19/2013	\$ 2,500
<u>Fundacion Caminante</u>	POB 411723	San Francisco	CA	94141	
Domestic workers rights campaign		ck # 6620		7/6/2013	\$ 1,500
<u>SW Rural Theatre Project</u>	115 Mt. Carmel Rd.	Albuquerque	NM	87113	
Rural theatre program		ck # 6645		8/11/2013	\$ 10,000
<u>Excelsior Action Group</u>	35 San Juan Ave	San Francisco	CA	94112	
mural painting		ck # 6840		8/28/2013	\$ 2000
<u>Pinyon Foundation</u>	c/o FNBSF, POB	Santa Fe	NM	87504	
Jim Terr Video Project		ck # 6719		2/4/2014	\$ 300
<u>SF Playhouse</u>	536 14th St. #5	San Francisco	CA	94103	
Tides Theatre		ck # 6726		2/24/2014	\$ 2500
<u>CUNY Law School End.</u>	2 Court Square	Long Island	NY	11101	
Law conference		ck # 6740		5/1/2014	\$ 2000

<u>Project Homeless Connect</u>	25 Van Ness Ave.	San Francisco	CA	94103	
		ck # visa	1/11/2014	\$ 3090	
<u>American Forest Alliance</u>	11 Salem Hill Road	Weaverville	NC	28787	
Charleston water emergency		ck # 6712	1/13/2014	\$ 10000	
<u>Committee on Poetry</u>	405 E 12th	New York	NY	10009	
computer purchase		ck # 6713	1/15/2014	\$ 1500	
<u>Mission Estancia PTA</u>	3330 Calle	Carlsbad	CA	92009	
general support		ck # 6714	1/16/2014	\$ 3000	
<u>Coal River Mountain Watch</u>	POB 274	Naoma	WV	25140	
health crisis in mountaintop removal communities		ck # 6715	1/20/2014	\$ 30000	
<u>Media Alliance</u>	1904 Franklin	Oakland	CA	94612	
Making of a Dream		ck # 6716	1/22/2014	\$ 3500	
<u>Ecoviva</u>	1904 Franklin St.	Oakland	CA	94612	
El Salvador project		ck # 6717	1/27/2014	\$ 1,500	
<u>Seattle Tilth</u>	4649 Sunnyside	Seattle	WA	98103	
Youth Garden Works		ck # 6722	2/11/2014	\$ 2500	
<u>Center for Biological Diversity</u>	POB 710	Tucson	AZ	85702	
Polar Bear Defense Fund		ck # 6723	2/13/2014	\$ 8000	
<u>Honor the Earth</u>	607 Main Street	Callaway	MN	56521	
Regranting for tribal economic development		ck # 6724	2/15/2014	\$ 10000	
<u>Anshie Lubavitch</u>	19-10 Morlot Ave.	Fair Lawn	NJ	07410	
general fund		ck # 6730	3/5/2014	\$ 4,000.	
<u>Anshie Lubavitch</u>	19-10 Morlot Ave.	Fair Lawn	NJ	07410	
general fund		ck # 6731	3/5/2014	\$ 2000	
<u>Congregation Shomrei Torah</u>	19-10 Morlot Ave.	Fair Lawn	NJ	07410	
general fund		ck # 6729	3/5/2014	\$ 2500	
<u>Legal Aid Justice Center</u>	1000 Preston Ave.	Charlottesville	VA	22903	
Virginia Institutionalized Persons Project		ck # 6732	3/10/2014	\$ 5,000	
<u>League for Yiddish</u>	64 Fulton	New York	NY	10038	
Yiddish magazine		ck # 6733	3/10/2014	\$ 5000	
<u>NYC Community Gardens</u>	232 E. 11th St	New York	NY	10003	
general support		ck # 6735	4/8/2014	\$ 5,000	
<u>Media Alliance</u>	1904 Franklin	Oakland	CA	94612	
Making of a Dream		ck # 6737	4/9/2014	\$ 3000	

<b><u>Dine Citizens Against Ruining Our</u></b>	10 A Town Plaza	Durango	CO	81301	
Navajo citizens educational group		ck # 6603	7/3/2013	\$ 30,000	
<b><u>UC Regents</u></b>	UC Berkeley 608	Berkeley	CA	94720	
student podcast on gender		ck # 6570	6/3/2013	\$ 5000	
<b><u>YIVO Institute for Jewish Research</u></b>	15 West 16th St	New York	NY	10011	
Scholarship Assistance for Yiddish Language Program		ck # 6571	6/3/2013	\$ 5,000	
<b><u>California Institute for</u></b>	333 Washington	Marina del	CA	90292	
Kafka Israel Project		ck # 6578	6/13/2013	\$ 3000	
<b><u>Fund for the City of New York</u></b>	121 Ave. of the	New York	NY	10012	
"Skraptacular" childrens art program		ck # 6579	6/13/2013	\$ 2000	
<b><u>Brightmoore Alliance</u></b>	17421 Telegraph	Detroit	MI	48219	
community development		ck # 6581	6/13/2013	\$ 2000	
<b><u>No More Deaths/Unitarian</u></b>	POB 40782	Tucson	AZ	85717	
No More Deaths mission		ck # 6582	6/14/2013	\$ 20000	
<b><u>Center for Biological Diversity</u></b>	POB 710	Tucson	AZ	85702	
Wolf Defense Fund		ck # 6585	6/15/2013	\$ 30000	
<b><u>Tierra Nativa/Social &amp;</u></b>	22231 Mulholland	Calabasas	CA	91302	
Tarahumaran biosphere preserve		ck # 6586	6/18/2013	\$ 15,000	
<b><u>Cornerstones</u></b>	227 Otero St.	Santa Fe	NM	87501	
historical preservation		ck # 6624	6/19/2013	\$ 10,000	
<b><u>Appalachian Community Health</u></b>	POB 274	Naoma	WV	25140	
health crisis in mountaintop removal communities		ck # 6602	7/3/2013	\$ 30,000.	
<b><u>Honor the Earth</u></b>	607 Main Street	Callaway	MN	56521	
Regranting for tribal economic development		ck # 6604	7/3/2013	\$ 20000	
<b><u>Arlene Francis Foundation</u></b>	386 Elizabeth St.	San Francisco	CA	94114	
Center for Spirit, Art and Politics		ck # 6595	6/25/2013	\$ 15000	
<b><u>Media Island Institute</u></b>	268 Bush St.	San Francisco	CA	94101	
Rising Tide campaign		ck # 6650	8/19/2013	\$ 30,000	
<b><u>WildEarth Guardians</u></b>	516 Alto St.	Santa Fe	NM	87501	
Powder River Basin protection		ck # 6606	7/3/2013	\$ 40,000	
<b><u>New Energy Economy</u></b>	343 East Alameda	Santa Fe	NM	87501	
general support		ck # 6607	7/3/2013	\$ 30,000	
<b><u>Oil Change International</u></b>	714 G St. SE #202	Washington	DC	20003	
Campaign to Seperate Oil and State		ck # 6651	8/22/2013	\$ 35,000	

<b><u>Move to Amend/Democracy</u></b>	POB 610	Eureka	CA	95501	
Campaign to amend the Constitution		ck # 6609	7/3/2013	\$ 30000	
<b><u>Physicians for Social Responsibility</u></b>	812 SW	Portland	OR	97205	
Campaign to retire Hanford nuclear power plant		ck # 6610	7/3/2013	\$ 30,000	
<b><u>Borneo/Earth Island Institute</u></b>	2150 Allston Way	Berkeley	CA	94704	
The Borneo Project		ck # 6611	7/4/2013	\$ 30000	
<b><u>Stop Exploitation Now</u></b>	<b>15100 SE</b>	<b>Bellevue WA</b>	<b>98006</b>		
Aid to Cambodian women and children		ck # 6612	7/4/2013	\$ 30,000	
<b><u>Yugtruf Youth for Yiddish</u></b>	419 Lafayette St.	New York	NY	10003	
Seminar for Teachers		ck # 6613	7/4/2013	\$ 16,000	
<b><u>The Forward</u></b>	125 Maiden Lane	New York	NY	10038	
website development		ck # 6614	7/4/2013	\$ 15,000	
<b><u>Organization for the Resolution of</u></b>	551 W. 181 St.	New York	NY	10033	
Jewish Divorce Assistance		ck # 6615	7/4/2013	\$ 30000	
<b><u>American Friends of Tel Aviv</u></b>	9911 W. Pico Blvd.	Los Angeles	CA	90035	
Israeli and Palestinian professors project		ck # 6616	7/4/2013	\$ 30,000	
<b><u>Shaharit/P.E.F. Israel Endowment</u></b>	317 Madison	New York	NY	10017	
Shaharit Institute		ck # 6617	7/4/2013	\$ 100,000	
<b><u>Shorefront Jewish Community</u></b>	128 Brighton Beach Brooklyn	NY	11235		
Food and social services		ck # 6619	7/8/2013	\$ 40,000	
<b><u>Missionary Society of CT</u></b>	125 Sherman St.	Hartford	CT	06105	
peace building in Columbia		ck # 6621	7/9/2013	\$ 30,000.00	
<b><u>Washington University St. Louis</u></b>	One Brookings	St. Louis	MO	63130	
Science scholarships		ck # 6622	7/9/2013	\$ 5,000	
<b><u>League of Wilderness Defenders</u></b>	POB 327	Eugene	OR	97440	
Touch the Earth Environmental School		ck # 6627	7/9/2013	\$ 5000	
<b><u>Injured Marine Semper Fi Fund</u></b>	825 College Blvd.	Oceanside	CA	92057	
general support		ck # 6633	7/15/2013	\$ 3,500	
<b><u>Congregation Shomrei Torah</u></b>	19-10 Morlot Ave.	Fair Lawn	NJ	07410	
general fund		ck # 6634	7/15/2013	\$ 3000	
<b><u>Anshei Lubavitch Outreach Center</u></b>	270 Passaic Ave	Passaic	NJ	07055	
general support		ck # 6635	7/15/2013	\$ 3,000.00	
<b><u>Yeshiva Bais Hillel</u></b>	270 Passaic Ave.	Passaic	NJ	07055	
Scholarship Fund		ck # 6636	7/15/2013	\$ 3,000	



<u>Orangutan Foundation</u>	824 S. Wellesley	Los Angeles	CA	90049	
Orangutan conservation		ck # 6637		7/16/2013	\$ 5000
<u>Elisal for Economic Empowerment</u>	5618 Dupont Drive	Santa Rosa	CA	95409	
Drums for Solar		ck # 6641		7/31/2013	\$ 1500
<u>Woontanara Aid</u>	POB 321	Victor	ID	83455	
West African aid		ck # 6642		7/31/2013	\$ 5000
<u>Spirit Rock Meditation Center</u>	5000 Sir Francis	Woodacre	CA	94973	
general support		ck # 6508		7/27/2013	\$ 5000
<u>Spirit Rock Meditation Center</u>	5000 Sir Francis	Woodacre	CA	94973	
teaching fund		ck # 6509		7/27/2013	\$ 10,000
<u>American Forest Alliance</u>	11 Salem Hill Rd.	Weaverville	NC	28787	
Film about eco activists		ck # 6646		8/12/2013	\$ 10000
<u>Anshei Lubavitch Outreach Center</u>	270 Passaic Ave	Passaic	NJ	07055	
general support		ck # 6647		8/12/2013	\$ 5000
<u>Conservation Voters NM Ed Fund</u>	507 Webber St. A	Santa Fe	NM	87505	
general support		ck # 6583		8/13/2013	\$ 5,000.
<u>Univ. of California Regents</u>	2481 Hearst Ave.	Berkeley	CA	94709	
Investigative Reporting Program		ck # 6648		8/13/2013	\$ 35,000
<u>University of San Francisco</u>	2130 Fulton	San Francisco	CA	94117	
Witness to Guantanamo project		ck # 6649		8/16/2013	\$ 40,000
<u>CHS Choral Boosters</u>	POB 92	Carlsbad	CA	92018	
general support		ck # 6653		8/28/2013	\$ 3000
<u>Mission Estancia PTA</u>	3330 Calle	Carlsbad	CA	92009	
general support		ck # 6654		8/28/2013	\$ 500
<u>Encinitas Education Fund</u>	3330 Calle	Carlsbad	CA	92009	
General Support		ck # 6654		8/28/2013	\$ 200
<u>Social/Environmental</u>	23532 Calabasas	Calabasas	CA	91302	
Outta Your Backpack Media		ck # 6659		9/6/2013	\$ 5000
<u>No Kid Hungry</u>	1730 M St. NW	Washington	DC	20036	
general support		ck # visa		9/10/2013	\$ 2500
<u>Painted Desert Demonstration</u>	145 Leupp Rd.	Flagstaff	AZ	86004	
Hopi permaculture		ck # 6660		9/11/2013	\$ 5000
<u>Santa Fe Farmers Market Institute</u>	1607 Paseo de	Santa Fe	NM	87501	
general support		ck # 6661		9/12/2013	\$ 5000

<b><u>Pinyon Foundation</u></b>	c/o FNBSF, POB	Santa Fe	NM	87504	
Jim Terr Video Project		ck # 6662	9/18/2013	\$ 1000	
<b><u>Appalachian Community Health</u></b>	POB 274	Naoma	WV	25140	
health crisis in mountaintop removal communities		ck # 6663	9/24/2013	\$ 5000.	
<b><u>NM Wilderness Alliance</u></b>	POB 25464	Albuquerque	NM	87125	
Otero Mesa Campaign		ck # 6664	9/27/2013	\$ 30000	
<b><u>New Energy Economy</u></b>	343 East Alameda	Santa Fe	NM	87501	
municipal power campaign		ck # 6665	9/30/2013	\$ 12,500	
<b><u>MADD San Diego</u></b>	10731 Treena	San Diego	CA	92131	
Campaign against drunk driving		ck # 6666	10/2/2013	\$ 5000	
<b><u>Longhorn Baseball Booster Club</u></b>	948 Lupine Hills	Vista	CA	92081	
youth baseball program		ck # 6667	10/7/2013	\$ 1,500	
<b><u>NYC Community Gardens</u></b>	232 E. 11th St.	New York	NY	10003	
general support		ck # 6669	10/9/2013	\$ 10,000	
<b><u>NM Wilderness Alliance</u></b>	POB 25464	Albuquerque	NM	87125	
general support		ck # 6584	10/16/2013	\$ 1,500	
<b><u>Abukar Madey Memorial Fund</u></b>	c/o 1726 SE Alder	Portland	OR	97214	
memorial fund		ck # 6674	10/18/2013	\$ 1,000	
<b><u>American Forest Alliance</u></b>	11 Salem Hill Rd.	Weaverville	NC	28787	
Film about eco activists		ck # 6675	10/22/2013	\$ 5000	
<b><u>Pinyon Foundation</u></b>	c/o FNBSF, POB	Santa Fe	NM	87504	
Jim Terr Video Project		ck # 6676	10/25/2013	\$ 500	
<b><u>Newcastle Art Studio</u></b>	Newbridge St.	New Castle	NE1 2TQ		
Refugee art project		ck # visa	10/31/2013	\$ 2,000	
<b><u>SF Progressive Media Center</u></b>	176 Winfield St.	San Francisco	CA	94110	
online publishing		ck # 6680	11/6/2013	\$ 2000	
<b><u>Yeshiva Bais Hillel</u></b>	270 Passaic Ave.	Passaic	NJ	07055	
Scholarship Fund		ck # 6681	11/8/2013	\$ 250	
<b><u>Santa Fe Farmers Market Institute</u></b>	1607 Paseo de	Santa Fe	NM	87501	
general support		ck # visa	10/7/2013	\$ 2,500	
<b><u>Lifelong AIDS Alliance</u></b>	1017 East Union	Seattle	WA	98122	
AIDS services		ck # 6684	11/13/2013	\$ 2,500	
<b><u>Taos Mens Shelter</u></b>	POB 1516	Taos	NM	87571	
Taos Men's Shelter		ck # 6685	11/13/2013	\$ 2500	

<u><b>Taos Jewish Center</b></u>	1335 Gusdorf Rd.	Taos	NM	87571	
Core Support		ck # 6686		11/13/2013	\$ 2500
<u><b>Environmentally Sound Promotions</b></u>	POB 2254	Redway	CA	95560	
general support		ck # 6688		11/13/2013	\$ 5,000
<u><b>North Helpline</b></u>	12736 33rd Av. NE	Seattle	WA	98125	
food bank		ck # 6689		11/19/2013	\$ 2500
<u><b>CIDA Foundation</b></u>	1107 Lakeview Dr.	Fairfield	IA	52556	
The Communitervsity		ck # 6690		11/26/2013	\$ 1000
<u><b>Seattle Tilth</b></u>	4649 Sunnyside	Seattle	WA	98103	
general support		ck # 6691		11/26/2013	\$ 2500
<u><b>American Forest Alliance</b></u>	11 Salem Hill Rd.	Weaverville	NC	28787	
climate campaign		ck # 6692		12/2/2013	\$ 5000
<u><b>Brooklyn Urban Garden School</b></u>	500 19th St.	Brooklyn	NY	11215	
general support for charter school		ck # 6693		12/5/2013	\$ 2000
<u><b>AKIN</b></u>	505 S Arden Blvd.	Los Angeles	CA	90020	
African Kids in Need		ck # 6695		12/12/2013	\$ 2500
<u><b>Horizons for Youth</b></u>	1201 Douglass St.	San Francisco	CA	94131	
San Francisco project		ck # 6697		12/12/2013	\$ 500
<u><b>Habitat for Humanity</b></u>	POB 369	Americus	GA	30709	
Global Village		ck # 6700		12/17/2013	\$ 2500
<u><b>Praise Chapel World Outreach</b></u>	7426 68th Ave. NE	Marysville	WA	98270	
Polar Bear Project		ck # 6701		12/18/2013	\$ 2500
<u><b>Warehouse 21</b></u>	1614 Paseo de	Santa Fe	NM	87501	
Theatre Project		ck # 6704		12/19/2013	\$ 1500
<u><b>Make A Wish Foundation of San</b></u>	2440 Hotel Cir N	San Diego	CA	92108	
Dying childrens charity		ck # 6706		12/30/2013	\$ 1,500.00
<u><b>Albuquerque Center for Peace &amp;</b></u>	202 Harvard SE	Albuquerque	NM	87106	
The Alliance for Wild Ethics		ck # 6707		12/30/2013	\$ 10,000
<u><b>NM Environmental Law Center</b></u>	1405 Luisa St., Ste.	Santa Fe	NM	87505	
Uranium mining defense		ck # 6708		1/2/2014	\$ 5,000
<u><b>Youth Media Project</b></u>	1000 Cordova	Santa Fe	NM	87505	
general support		ck # 6709		1/2/2014	\$ 5000
<u><b>Center for Southwest Culture</b></u>	500 Copper Ave.	Albuquerque	NM	87102	
Mora community group		ck # 6711		1/9/2014	\$ 10,000

<u>Pittsburg High School Band</u>	333 Yosemite Dr.	Pittsburg	CA	94565	
Marching band trip to NYC		ck # 6696		12/12/2013	\$ 3,000
<u>Conservation Voters NM Ed Fund</u>	507 Webber St. A	Santa Fe	NM	87505	
general support		ck # 6124		6/7/2013	\$ 5,000.
<u>Community Environmental Legal</u>	POB 360	Mercersburg	PA	17236	
Mora County drilling ban campaign		ck # 6618		7/5/2013	\$ 5000
<u>Hokey Pokey/Environmentally</u>	POB 2254	Redway	CA	95560	
film editing		ck # online		8/1/2013	\$ 2,000
<u>Spirit Rock Meditation Center</u>	5000 Sir Francis	Woodacre	CA	94973	
kitchen fund		ck # visa		8/1/2013	\$ 550.
<u>Give Grande New Mexico</u>		Wagon Mound NM			
building restoration		ck # online		5/8/2014	\$ 2,000.

Total

\$1,184,340