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Form **990-PF**

Return of Private Foundation

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

OMB No 1545-0052

2013Department of the Treasury
Internal Revenue Service

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

Open to Public Inspection

For calendar year 2013 or tax year beginning 7/1/2013, and ending 6/30/2014

Name of foundation THE STEVEN J LEVINSON MEDICAL RESEARCH FOUNDATION, INC.			A Employer identification number 22-3525125							
Number and street (or P.O. box number if mail is not delivered to street address) c/o L. WOLLIN 124 PROSPECT ST		Room/suite	B Telephone number (see instructions) 212-785-2610							
City or town RIDGEWOOD	State NJ	ZIP code 07450								
Foreign country name	Foreign province/state/county	Foreign postal code	C If exemption application is pending, check here ☐							
G Check all that apply: <table border="0"> <tr> <td>☐ Initial return</td> <td>☐ Initial return of a former public charity</td> </tr> <tr> <td>☐ Final return</td> <td>☐ Amended return</td> </tr> <tr> <td>☐ Address change</td> <td>☐ Name change</td> </tr> </table>			☐ Initial return	☐ Initial return of a former public charity	☐ Final return	☐ Amended return	☐ Address change	☐ Name change	D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐	
☐ Initial return	☐ Initial return of a former public charity									
☐ Final return	☐ Amended return									
☐ Address change	☐ Name change									
H Check type of organization ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here ☐							
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,335,932		J Accounting method. ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis)								
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐										

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check ☐ if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	10,899	10,899		
5a Gross rents				
5b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	960			
6b Gross sales price for all assets on line 6a	185,777			
7 Capital gain net income (from Part IV, line 2)		960		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
10b Less: Cost of goods sold				
10c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	11,859	11,859	0	
13 Compensation of officers, directors, trustees, etc.				
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
16b Accounting fees (attach schedule)				
16c Other professional fees (attach schedule)	6,358	6,358		
17 Interest				
18 Taxes (attach schedule) (see instructions)	335			
19 Depreciation (attach schedule) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule)	2,316			2,316
24 Total operating and administrative expenses. Add lines 13 through 23	9,009	6,358	0	2,316
25 Contributions, gifts, grants paid	72,300			72,300
26 Total expenses and disbursements. Add lines 24 and 25	81,309	6,358	0	74,616
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-69,450			
b Net investment income (if negative, enter -0-)		5,501		
c Adjusted net income (if negative, enter -0-)			0	

For Paperwork Reduction Act Notice, see instructions.

Form **990-PF** (2013)

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OPERATING AND ADMINISTRATIVE EXPENSES

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22

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	141		
	2	Savings and temporary cash investments	1,243,519	9,990	9,990
	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)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)		1,164,220	1,210,942
Liabilities	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 ▶ ART HELD FOR PUBLIC EXHIBIT)	223,150	223,150	115,000
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	1,466,810	1,397,360	1,335,932
	17	Accounts payable and accrued expenses			
	18	Grants payable			
Net Assets or Fund Balances	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	Total liabilities (add lines 17 through 22)	0	0	
		Foundations that follow SFAS 117, check here ☐			
		and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	1,466,810	1,397,360	
	30	Total net assets or fund balances (see instructions)	1,466,810	1,397,360	
	31	Total liabilities and net assets/fund balances (see instructions)	1,466,810	1,397,360	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,466,810
2	Enter amount from Part I, line 27a	2	-69,450
3	Other increases not included in line 2 (itemize) ▶ <u>ROUNDING</u>	3	
4	Add lines 1, 2, and 3	4	1,397,360
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	1,397,360

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 SCHEDULE ATTACHED		P	12/23/2013	6/30/2014
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 185,777		184,817	960
b			
c			
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a			960
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	960
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	960

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?
If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.☐ Yes ☒ No**1** Enter the appropriate amount in each column for each year; see the instructions before making any entries.

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2012	55,912	1,262,998	0.044269
2011	73,885	1,326,602	0.055695
2010	84,878	1,403,195	0.060489
2009	75,772	1,468,823	0.051587
2008	2,000	1,550,337	0.001290

2 Total of line 1, column (d)	2	0.213330
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	0.042666
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	947,754
5 Multiply line 4 by line 3	5	40,437
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	55
7 Add lines 5 and 6	7	40,492
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	74,616

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)			
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1		55
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2		0
3	Add lines 1 and 2	3		55
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4		
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5		55
6	Credits/Payments:			
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	287	
b	Exempt foreign organizations—tax withheld at source	6b		
c	Tax paid with application for extension of time to file (Form 8868)	6c	750	
d	Backup withholding erroneously withheld	6d		
7	Total credits and payments. Add lines 6a through 6d	7		1,037
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		0
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		982
11	Enter the amount of line 10 to be Credited to 2014 estimated tax 982 Refunded	11		0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? <i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ _____ (2) On foundation managers. ▶ \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV</i>	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ DE		
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 <i>General Instruction G</i> ? <i>If "No," attach explanation</i>	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address ► N/A				
14	The books are in care of ► LONNIE WOLLIN Telephone no. ► 201-816-8404			
Located at ► 124 PROSPECT ST., RIDGEWOOD, NJ, ZIP+4 ► 07450				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year	15		
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 the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►				X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly).		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No		
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► ☐	1b	N/A
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?	1c	X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5)).		
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? ☐ Yes ☒ No If "Yes," list the years ► 20 ____ , 20 ____ , 20 ____ , 20 ____		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions.)	2b	N/A
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20 ____ , 20 ____ , 20 ____ , 20 ____		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2013 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013)	3b	N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b	X

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	N/A
	Organizations relying on a current notice regarding disaster assistance check here	☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ 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	X
	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	N/A

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
SCHEDULE ATTACHED				

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

**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 instructions	
3	
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	680,031
b	Average of monthly cash balances	1b	282,156
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	962,187
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1e		
2	Acquisition indebtedness applicable to line 1 assets	2	
3	Subtract line 2 from line 1d	3	962,187
4	Cash deemed held for charitable activities. Enter 1 1/4 % of line 3 (for greater amount, see instructions)	4	14,433
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	947,754
6	Minimum investment return. Enter 5% of line 5	6	47,388

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	47,388
2a	Tax on investment income for 2013 from Part VI, line 5 2a 55		
b	Income tax for 2013. (This does not include the tax from Part VI.) 2b		
c	Add lines 2a and 2b	2c	55
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	47,333
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	47,333
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	47,333

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	74,616
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	74,616
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	55
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	74,561

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				47,333
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only			56,329	
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				
d From 2011				
e From 2012				
f Total of lines 3a through e	0			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 74,616				
a Applied to 2012, but not more than line 2a			56,329	
b Applied to undistributed income of prior years (Election required—see instructions)				
c Treated as distributions out of corpus (Election required—see instructions)				
d Applied to 2013 distributable amount				18,287
e Remaining amount distributed out of corpus				
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	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				
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			0	
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				29,046
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				
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)

N/A

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 **N/A**

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 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	
85% of line 2a				0
c Qualifying distributions from Part XII, line 4 for each year listed				0
d Amounts included in line 2c not used directly for active conduct of exempt activities				0
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c				0
3 Complete 3a, b, or c for the alternative test relied upon.				
a "Assets" alternative test—enter:				
(1) Value of all assets				0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				0
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				0
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)				0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				0
(3) Largest amount of support from an exempt organization				0
(4) Gross investment income				0

Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year—see instructions.)**1 Information Regarding Foundation Managers:**

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

BEDE LEVINSON

LEANDRO P. RIZZUTO

- 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:

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

- c** Any submission deadlines:

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i> SCHEDULE ATTACHED	N/A	PC		72,300
Total			▶ 3a	72,300
b <i>Approved for future payment</i>				
Total			▶ 3b	0

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

- | 1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | Yes | No |
|---|--|-----|----|
| a | Transfers from the reporting foundation to a noncharitable exempt organization of: | | |
| | (1) Cash | | X |
| | (2) Other assets | | X |
| b | Other transactions: | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

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

**Sign
Here**

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

Wale Vernonson
Signature of officer or trustee

3/9/15
Date

PRESIDENT
Title

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

Paid
Preparer
Use Only

Print/Type preparer's name

LONNIE WOLLIN

Preparer's signature

Preparer's signature Parine Wallin

Date _____

2/9/2015

Check ☐ if self-employed

PTIN

P01282474

Firm's name ► LONNIE E WOLLIN PC

Firm's EIN ▶ 13-3368041

Firm's address ► 124 PROSPECT ST, RIDGEWOOD, NJ 07450

Phone no. (201) 816-8404

Part I, Line 16c (990-PF) - Other Professional Fees

		6,358	6,358	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes (Cash Basis Only)
1	MERRILL LYNCH INVESTMENTS	6,358	6,358		

Part I, Line 18 (990-PF) - Taxes

		335	0	0	0
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	Real estate tax not included in line 20				
2	Tax on investment income				
3	Income tax				
4	DELAWARE FRANCHISE TAX	25			
5	DELAWARE REP FEE	310			

Part I, Line 23 (990-PF) - Other Expenses

		2,316	0	0	2,316
Description		Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
1	Office Expenses				
2	EXHIBIT EXPENSE	2,316			2,316
3	BANK CHARGE				

Part II, Line 10c (990-PF) - Investments - Corporate Bonds

		0	1,164,220	0	1,210,942
		Book Value	Book Value	FMV	FMV
		End of Year	Beg. of Year	Beg. of Year	End of Year
1	SCHEDULE ATTACHED				
		1,164,220			1,210,942

Part II, Line 15 (990-PF) - Other Assets

		223,150	223,150	115,000
Asset Description		Book Value Beg of Year	Book Value End of Year	FMV End of Year
1	ART HELD FOR PUBLIC EXHIBIT	223,150	223,150	115,000

06/30/2014

The Steven J Levinson Medical Research Fdn

02/09/15

SEC Positions				
		PART II Line 10c		
Shares	Descriptions	Date Purch	Cost	Fair Market Market
682	ISHARES TIPS BOND ETF	08/30/13	75,664 72	78,675 52
	ISHARES TIPS BOND ETF	06/09/14	113 47	115 12
1,831	VANGUARD REIT ETF	08/30/13	117,743 48	137,032 04
	VANGUARD REIT ETF	04/01/14	67 35	73 23
536	SPDR DB INTL GOV INFL	08/30/13	30,799 13	33,237 36
	SPDR DB INTL GOV INFL	06/11/14	23 09	23 43
14,056	CREDIT SUISSE COMMODITY RET STRATEGY FD CL I	08/30/13	104,998 32	108,231 20
	CREDIT SUISSE COMMODITY RET STRATEGY FD CL I	08/30/13	1 68	1 73
25,000	FEDERAL NATL MTG ASSOC CALLABLE NOTES	01/30/14	25,000 00	25,018 25
25,000	FEDERAL NATL MTG ASSOC NOTES	02/26/14	24,506 75	24,580 50
25,000	FEDERAL NATL MTG ASSOC NOTES	09/26/13	24,926 50	25,015 00
85,000	FNMA PAE0378 05 50%2025	09/19/13	22,260 89	22,073 84
150,000	FNMA PAD0629 05%2024	09/24/13	23,545 53	23,898 30
45,000	FEDERAL HOME LN MTG CORP	10/10/13	43,875 90	44,357 40
25,000	FEDERAL HOME LN MTG CORP CALLABLE NOTES SR 0000	04/14/14	25,078 44	25,029 25
25,000	CITIGROUP INC GLB	09/23/13	26,101 24	27,175 00
25,000	COMCAST CORP	09/12/13	27,470 71	28,648 75
25,000	GOLDMAN SACHS GROUP INC	09/13/13	25,635 08	25,785 50
25,000	GENERAL ELEC CAP CORP	09/12/13	27,800 53	28,645 75
25,000	JP MORGAN CHASE & CO	09/16/13	25,829 34	26,058 75
25,000	MORGAN STANLEY	09/12/13	27,048 09	28,755 25
25,000	NATIONAL RURAL UTILITIES	09/16/13	27,499 04	27,906 25
25,000	VERIZON COMMUNICATIONS	01/29/14	26,844 16	27,499 75
25,000	USD ONTARIO PROVINCE	09/12/13	23,038 00	24,410 75
25,000	USD ROYAL BK CANADA	09/12/13	24,468 50	24,936 00
25,000	BP CAPITAL MARKETS PLC	09/12/13	26,486 11	27,880 00
25,000	RIO TINTO FIN USA LTD	09/12/13	25,425 88	25,805 00
25,000	AMERICAN EXPRESS CREDIT	09/30/13	25,894 86	26,030 50
25,000	PHOENIX ARIZ	10/23/13	23,962 25	24,084 75
25,000	MARYLAND ST CTFS PARTN	09/16/13	25,525 43	25,776 50
25,000	ILLINOIS ST TAXABLE	03/06/14	27,173 26	27,315 75
25,000	GEORGIA MUN ELEC AUTH	09/20/13	25,940 98	26,261 75
25,000	FLA HURRICANE CATASTRPHE	09/11/13	22,918 75	25,233 25
25,000	COLORADO ST BRD GOV UNV	09/11/13	25,000 00	25,907 00
25,000	KANSAS CITY MO SPL OBLIG	09/25/13	25,000 00	26,261 50
25,000	UNIVERSITY OKLA REVS	09/26/13	25,000 00	25,540 75
25,000	STRATFORD CONN TAXABLE	10/13/13	25,000 00	25,749 75
25,000	CALIFORNIA ST VAR PURP	03/20/14	29,485 82	30,133 50
25,000	ADAMS-ARAPAHOE COLO JT	09/19/13	25,078 36	25,169 50
25,000	NEW JERSEY ST TRANSN TR	09/17/13	25,988 30	26,608 75
			1,164,219 94	1,210,942 17

SHORT TERM		Part IV line 1a							
Acquisition	Trade Date	Transaction Description	Quantity	Sales Price	Cost Basis	Gain/(Loss)			
09/12/13	10/10/13	FHLMC G1 8461 02 50%2028	40,000	38,353.81	38,053.40	300.41			
10/15/13		Principal payment - FHLMC G1 8461 02 50%2028		287.98	287.98				
10/25/13		Principal payment - FNMA PAE0378 05 50%2025		931.66	931.66				
10/25/13		Principal payment - FNMA PAD0629 05%2024		863.51	863.51				
11/25/13		Principal payment - FNMA PAE0378 05 50%2025		953.18	953.18				
11/25/13		Principal payment - FNMA PAD0629 05%2024		899.17	899.17				
12/26/13		Principal payment - FNMA PAE0378 05 50%2025		807.18	807.18				
12/26/13		Principal payment - FNMA PAD0629 05%2024		832.54	832.54				
09/11/13	01/17/14	FEDERAL HOME LN MTG CORP	30,000	30,000.00	30,386.80	(386.80)			
01/27/14		Principal payment - FNMA PAD0629 05%2024		825.44	825.44				
01/27/14		Principal payment - FNMA PAE0378 05 50%2025		717.12	717.12				
09/24/13	02/11/14	LANCASTER EDL ASSIST INC	25,000	24,527.22	23,900.05	627.17			
02/25/14		Principal payment - FNMA PAD0629 05%2024		817.72	817.72				
02/25/14		Principal payment - FNMA PAE0378 05 50%2025		726.49	726.49				
10/18/13	02/24/14	CONNECTICUT ST TEACHERS	25,000	28,673.13	28,092.60	580.53			
09/19/13	03/17/04	NY ST DORM AR ST PERS	25,000	25,000.00	25,130.24	(130.24)			
03/25/14		Principal payment - FNMA PAD0629 05%2024		761.14	761.14				
03/25/14		Principal payment - FNMA PAE0378 05 50%2025		610.58	610.58				
09/24/13	04/10/14	FEDERAL NATL MTG ASSOC	25,000	25,000.00	25,031.25	(31.25)			
04/25/14		Principal payment - FNMA PAD0629 05%2024		821.57	821.57				
04/25/14		Principal payment - FNMA PAE0378 05 50%2025		619.06	619.06				
05/27/14		Principal payment - FNMA PAD0629 05%2024		782.97	782.97				
05/27/14		Principal payment - FNMA PAE0378 05 50%2025		592.41	592.41				
06/25/14		Principal payment - FNMA PAD0629 05%2024		787.54	787.54				
06/25/14		Principal payment - FNMA PAE0378 05 50%2025		585.41	585.41				
				185,776.83	184,817.01	959.82			

6/30/14

SJ LEVINSON MEDICAL RESEARCH FDN

02/09/15

PART VIII line 1a	TITLE	TITLE	COMPENSATION	BENEFITS	EXPENSE ACCT
BEDE LEVINSON PURCHASE, NY	DIRECTOR	PRES P/T	0	0	0
JAMES DUBIN NY, NY	DIRECTOR	VP P/T	0	0	0
SUSAN DUBIN NY, NY	DIRECTOR	VP P/T	0	0	0
LEANDRO P RIZZUTO NY, NY	DIRECTOR		0	0	0
MATTHEW LEVINSON 9 Cider Mill Circle Armonk, NY 10504	DIRECTOR	VP P/T	0	0	0
ETHAN LEVINSON PURCHASE, NY	DIRECTOR	VP P/T	0	0	0
RACHEL BAILINE MIAMI, FL	DIRECTOR	VP P/T	0	0	0
LONNIE WOLLIN 124 PROSPECT ST RIDGEWOOD, NJ 07450	DIRECTOR	SECY-TREASURER P/T	0	0	0

02/09/15

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