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Form 990-PF

## Return of Private Foundation

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

- Do not enter Social Security numbers on this form as it may be made public. By law, the IRS cannot redact the information on the form.
- Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

2013

Open to Public  
Inspection

For calendar year 2013, or tax year beginning 09-01-2013, and ending 08-31-2014

Name of foundation SHERRY AND ALAN LEVENTHAL FAMILY FOUNDATION		A Employer identification number 26-3358768	
Number and street (or P O box number if mail is not delivered to street address) C/O BEACON CAPITAL 200 STATE STREET ROOM/SUITE 5TH FL		B Telephone number (see instructions) (617) 457-0489	
C If exemption application is pending, check here ► <input type="checkbox"/>			
D 1. Foreign organizations, check here ► <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>			
E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>			
F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>			
G 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		H 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	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ► \$ 2,070,177		J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	

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)	5,943,888			
2	Check ► <input type="checkbox"/> if the foundation is not required to attach Sch B				
3	Interest on savings and temporary cash investments	501	501		
4	Dividends and interest from securities. . . . .	85,292	85,292		
5a	Gross rents . . . . .				
b	Net rental income or (loss) _____				
6a	Net gain or (loss) from sale of assets not on line 10	2,566,010			
b	Gross sales price for all assets on line 6a 4,445,910				
7	Capital gain net income (from Part IV, line 2) . . . . .		2,566,010		
8	Net short-term capital gain . . . . .				
9	Income modifications . . . . .			2,500	
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 . . . . .	8,595,691	2,651,803	2,500	
Operating and Administrative Expenses					
13	Compensation of officers, directors, trustees, etc				
14	Other employee salaries and wages . . . . .				
15	Pension plans, employee benefits . . . . .				
16a	Legal fees (attach schedule) . . . . .	6,224	6,224		
b	Accounting fees (attach schedule) . . . . .	5,000	5,000		
c	Other professional fees (attach schedule) . . . . .	20,588		20,588	
17	Interest . . . . .				
18	Taxes (attach schedule) (see instructions)	45,812			
19	Depreciation (attach schedule) and depletion . . . . .				
20	Occupancy . . . . .				
21	Travel, conferences, and meetings . . . . .				
22	Printing and publications . . . . .				
23	Other expenses (attach schedule) . . . . .	7,126	7,126		
24	<b>Total operating and administrative expenses.</b>				
	Add lines 13 through 23 . . . . .	84,750	18,350		20,588
25	Contributions, gifts, grants paid. . . . .	3,903,952			3,903,952
26	<b>Total expenses and disbursements.</b> Add lines 24 and 25	3,988,702	18,350		3,924,540
27	Subtract line 26 from line 12				
a	<b>Excess of revenue over expenses and disbursements</b>	4,606,989			
b	<b>Net investment income</b> (if negative, enter -0-) . . . . .		2,633,453		
c	<b>Adjusted net income</b> (if negative, enter -0-) . . . . .			2,500	

<b>Part II</b> <b>Balance Sheets</b>		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
<b>Assets</b>					
1	Cash—non-interest-bearing . . . . .		97,373	68,845	68,845
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)				
b	Investments—corporate stock (attach schedule) . . . . .	1,379,790	3,615,549	2,001,332	
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) . . . . .				
14	Land, buildings, and equipment basis ►				
	Less accumulated depreciation (attach schedule) ►				
15	Other assets (describe ►) . . . . .				
16	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	1,477,163	3,684,394	2,070,177	
<b>Liabilities</b>					
17	Accounts payable and accrued expenses . . . . .		1,000		
18	Grants payable . . . . .				
19	Deferred revenue . . . . .				
20	Loans from officers, directors, trustees, and other disqualified persons				
21	Mortgages and other notes payable (attach schedule) . . . . .				
22	Other liabilities (describe ►) . . . . .				
23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .		1,000		
<b>Net Assets or Fund Balances</b>					
24	Unrestricted . . . . .	1,477,163	3,683,394		
25	Temporarily restricted . . . . .				
26	Permanently restricted . . . . .				
27	<b>Foundations that follow SFAS 117, check here ►</b> <input checked="" type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>				
28	Capital stock, trust principal, or current funds . . . . .				
29	Paid-in or capital surplus, or land, bldg , and equipment fund				
30	<b>Total net assets or fund balances</b> (see page 17 of the instructions) . . . . .	1,477,163	3,683,394		
31	<b>Total liabilities and net assets/fund balances</b> (see page 17 of the instructions) . . . . .	1,477,163	3,684,394		

**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	1,477,163
2	Enter amount from Part I, line 27a . . . . .	2	4,606,989
3	Other increases not included in line 2 (itemize) ►	3	2,500
4	Add lines 1, 2, and 3 . . . . .	4	6,086,652
5	Decreases not included in line 2 (itemize) ►	5	2,403,258
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	3,683,394

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

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

<b>(e)</b> Gross sales price	<b>(f)</b> Depreciation allowed (or allowable)	<b>(g)</b> Cost or other basis plus expense of sale	<b>(h)</b> Gain or (loss) (e) plus (f) minus (g)
<b>a</b> See Additional Data Table			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

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

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

<b>2</b> Capital gain net income or (net capital loss)	<b>(l)</b> Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	<b>2</b>	2,566,010
<b>3</b> 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		<b>3</b>	111

**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

<b>(a)</b> Base period years Calendar year (or tax year beginning in)	<b>(b)</b> Adjusted qualifying distributions	<b>(c)</b> Net value of noncharitable-use assets	<b>(d)</b> Distribution ratio (col (b) divided by col (c))
2012	2,267,369	1,505,265	1 506292
2011	2,161,307	688,626	3 138579
2010	2,167,323	722,697	2 998937
2009	1,026,200	23,734	43 237550
2008			

<b>2</b> Total of line 1, column (d).	<b>2</b>	50 881358
<b>3</b> 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	<b>3</b>	12 720340
<b>4</b> Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	<b>4</b>	1,831,843
<b>5</b> Multiply line 4 by line 3.	<b>5</b>	23,301,666
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b).	<b>6</b>	26,335
<b>7</b> Add lines 5 and 6.	<b>7</b>	23,328,001
<b>8</b> Enter qualifying distributions from Part XII, line 4.	<b>8</b>	3,924,540

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions

**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)**

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		
Date of ruling or determination letter _____ <b>(attach copy of letter if necessary—see instructions)</b>		1	52,669
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b . . . . .		
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .	2	
3	Add lines 1 and 2. . . . .	3	52,669
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . . . .	4	
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . . . .	5	52,669
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	23,000
b	Exempt foreign organizations—tax withheld at source . . . . .	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld . . . . .	6d	
7	Total credits and payments Add lines 6a through 6d. . . . .	7	23,000
8	Enter any <b>penalty</b> for underpayment of estimated tax Check here <input checked="" type="checkbox"/> if Form 2220 is attached . . . . .	8	
9	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	9	29,669
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	10	
11	Enter the amount of line 10 to be <b>Credited to 2014 estimated tax</b> <input type="checkbox"/> <b>Refunded</b> <input type="checkbox"/>	11	

**Part VII-A Statements Regarding Activities**

		<b>Yes</b>	<b>No</b>
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? . . . . .	1a	No
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? . . . . .	1b	No
<i>If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.</i>			
c	Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	1c	
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year <b>(1) On the foundation</b> <input type="checkbox"/> \$ _____ <b>(2) On foundation managers</b> <input type="checkbox"/> \$ _____		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . <i>If "Yes," attach a detailed description of the activities.</i>	2	No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	4a	No
b	If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	4b	
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>	5	No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either ● By language in the governing instrument, or ● By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .	6	
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>	7	Yes
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> MA		
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>	8b	Yes
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i> <input checked="" type="checkbox"/>	10	Yes

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions). . . . .	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions) . . . . .	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? . . . . .	13	Yes	

Website address ► N/A

14 The books are in care of ► TRUST Telephone no ► (617) 457-0489  
 Located at ► 200 STATE STREET 5TH FLOOR BOSTON MA ZIP +4 ► 02109

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

16 At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? . . . . . ► 16 Yes No

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

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

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

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

**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))? . . . . . (2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? . . . . . (3) Provide a grant to an individual for travel, study, or other similar purposes? . . . . . (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). . . . . (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? . . . . . 	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b	If any answer is "Yes" to 5a(1)–(5), did <b>any</b> of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? . . . . . Organizations relying on a current notice regarding disaster assistance check here. . . . . <input type="checkbox"/>		5b
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? . . . . . <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	<input type="checkbox"/> Yes <input type="checkbox"/> No	
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . . <i>If "Yes" to 6b, file Form 8870.</i>		6b No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .		7b

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

**1. List all officers, directors, trustees, foundation managers and their compensation (see instructions)**

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).				
<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
ALAN M LEVENTHAL 	TRUSTEE 2 00	0	0	
200 STATE STREET 5TH FLOOR BOSTON, MA 02109				
SHERRY M LEVENTHAL 	TRUSTEE 2 00	0	0	
200 STATE STREET 5TH FLOOR BOSTON, MA 02109				

**2. Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE"**

**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		
<b>Total</b> 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 GRANT MAKING	3,922,040
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 N/A	
2	
All other program-related investments. See page 24 of the instructions	
3	
<b>Total.</b> 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 1,762,649
b	Average of monthly cash balances. . . . .	1b 97,090
c	Fair market value of all other assets (see instructions). . . . .	1c 0
d	<b>Total</b> (add lines 1a, b, and c). . . . .	1d 1,859,739
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 1,859,739
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions). . . . .	4 27,896
5	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3 Enter here and on Part V, line 4	5 1,831,843
6	<b>Minimum investment return.</b> Enter 5% of line 5. . . . .	6 91,592

**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 91,592
2a	Tax on investment income for 2013 from Part VI, line 5. . . . .	2a 52,669
b	Income tax for 2013 (This does not include the tax from Part VI ). . . . .	2b
c	Add lines 2a and 2b. . . . .	2c 52,669
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3 38,923
4	Recoveries of amounts treated as qualifying distributions. . . . .	4 2,500
5	Add lines 3 and 4. . . . .	5 41,423
6	Deduction from distributable amount (see instructions). . . . .	6
7	<b>Distributable amount</b> as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1. . . . .	7 41,423

**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 3,924,540
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	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4 3,924,540
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
6	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4. . . . .	6 3,924,540

**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
<b>1</b> Distributable amount for 2013 from Part XI, line 7				41,423
<b>2</b> Undistributed income, if any, as of the end of 2013				
<b>a</b> Enter amount for 2012 only. . . . .				
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2013				
<b>a</b> From 2008. . . . .	112,441			
<b>b</b> From 2009. . . . .	1,025,013			
<b>c</b> From 2010. . . . .	2,131,188			
<b>d</b> From 2011. . . . .	2,126,876			
<b>e</b> From 2012. . . . .	2,213,109			
<b>f Total of lines 3a through e. . . . .</b>	7,608,627			
<b>4</b> Qualifying distributions for 2013 from Part XII, line 4 ► \$ 3,924,540				
<b>a</b> Applied to 2012, but not more than line 2a				
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .				
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .				
<b>d</b> Applied to 2013 distributable amount. . . . .				41,423
<b>e</b> Remaining amount distributed out of corpus	3,883,117			
<b>5</b> Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)				
<b>6</b> Enter the net total of each column as indicated below:	11,491,744			
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5				
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
<b>c</b> Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed. . . . .				
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .				
<b>e</b> Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .				
<b>f</b> Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014 . . . . .				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions). . . . .				
<b>8</b> Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . . . .	112,441			
<b>9</b> Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a . . . . .	11,379,303			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2009. . . . .	1,025,013			
<b>b</b> Excess from 2010. . . . .	2,131,188			
<b>c</b> Excess from 2011. . . . .	2,126,876			
<b>d</b> Excess from 2012. . . . .	2,213,109			
<b>e</b> Excess from 2013. . . . .	3,883,117			

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

1a	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling.			
1b	Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)			
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.			
2b	85% of line 2a.			
2c	Qualifying distributions from Part XII, line 4 for each year listed.			
2d	Amounts included in line 2c not used directly for active conduct of exempt activities.			
2e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c.			
3	Complete 3a, b, or c for the alternative test relied upon			
a	"Assets" alternative test—enter			
(1)	Value of all assets.			
(2)	Value of assets qualifying under section 4942(j)(3)(B)(i).			
b	"Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.			
c	"Support" alternative test—enter			
(1)	Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).			
(2)	Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).			
(3)	Largest amount of support from an exempt organization			
(4)	Gross investment income			

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

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

ALAN M LEVENTHAL

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

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

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

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

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

c Any submission deadlines

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

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b> See Additional Data Table				
<b>Total</b> . . . . .			► 3a	3,903,002
<b>b Approved for future payment</b>				
<b>Total</b> . . . . .			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Line	Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions )
			(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1</b> Program service revenue	a _____ b _____ c _____ d _____ e _____ f _____						
<b>g</b> Fees and contracts from government agencies							
<b>2</b> Membership dues and assessments. . . . .							
<b>3</b> Interest on savings and temporary cash investments . . . . .							501
<b>4</b> Dividends and interest from securities. . . . .							85,292
<b>5</b> Net rental income or (loss) from real estate	a Debt-financed property. . . . . b Not debt-financed property. . . . .						
<b>6</b> Net rental income or (loss) from personal property. . . . .							
<b>7</b> Other investment income. . . . .							
<b>8</b> Gain or (loss) from sales of assets other than inventory . . . . .							2,566,010
<b>9</b> Net income or (loss) from special events							
<b>10</b> Gross profit or (loss) from sales of inventory. . . . .							
<b>11</b> Other revenue a _____ b _____ c _____ d _____ e _____							
<b>12</b> Subtotal Add columns (b), (d), and (e). . . . .							2,651,803
<b>13</b> <b>Total.</b> Add line 12, columns (b), (d), and (e). . . . . (See worksheet in line 13 instructions to verify calculations.)						13	2,651,803

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



2013

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

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

► Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at  
[www.irs.gov/form990](http://www.irs.gov/form990).**Name of the organization**SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION**Employer identification number**

26-3358768

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

Form 990 or 990-EZ

501(c)( ) (enter number) organization

4947(a)(1) nonexempt charitable trust **not** treated as a private foundation

527 political organization

Form 990-PF

501(c)(3) exempt private foundation

4947(a)(1) nonexempt charitable trust treated as a private foundation

501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions

**General Rule**

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

**Special Rules**

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

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

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

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

**Name of organization**SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION**Employer identification number**

26-3358768

**Part I** **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	ALAN M LEVENTHAL 200 STATE STREET 5TH FLOOR  BOSTON, MA 02109	\$ 5,943,888	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/>
			(Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions )
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/>
			(Complete Part II for noncash contributions )

**Name of organization**SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION**Employer identification number**

26-3358768

<b>Part II Noncash Property</b> (see instructions) Use duplicate copies of Part II if additional space is needed			
<b>(a) No. from Part I</b>	<b>(b) Description of noncash property given</b>	<b>(c) FMV (or estimate) (see instructions)</b>	<b>(d) Date received</b>
1	DELAWARE US GROWTH FUND	\$ 575,608	2014-05-19
<b>(a) No. from Part I</b>	<b>(b) Description of noncash property given</b>	<b>(c) FMV (or estimate) (see instructions)</b>	<b>(d) Date received</b>
1	JPMORGAN MIDCAP	\$ 59,118	2014-05-19
<b>(a) No. from Part I</b>	<b>(b) Description of noncash property given</b>	<b>(c) FMV (or estimate) (see instructions)</b>	<b>(d) Date received</b>
1	MGR AMG FUNDS/TIMES SQUARE	\$ 1,339,422	2014-05-19
<b>(a) No. from Part I</b>	<b>(b) Description of noncash property given</b>	<b>(c) FMV (or estimate) (see instructions)</b>	<b>(d) Date received</b>
1	MGR AMG FUNDS/TIMES SQUARE	\$ 2,012,920	2013-11-19
<b>(a) No. from Part I</b>	<b>(b) Description of noncash property given</b>	<b>(c) FMV (or estimate) (see instructions)</b>	<b>(d) Date received</b>
1	VARIOUS SHARES	\$ 1,956,820	2014-08-28
<b>(a) No. from Part I</b>	<b>(b) Description of noncash property given</b>	<b>(c) FMV (or estimate) (see instructions)</b>	<b>(d) Date received</b>
		\$	

Name of organization SHERRY AND ALAN LEVENTHAL FAMILY FOUNDATION			Employer identification number 26-3358768
<b>Part III</b> <b>Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year.</b> Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of <i>exclusively religious, charitable, etc., contributions of \$1,000 or less</i> for the year (Enter this information once. See instructions ) ► \$ Use duplicate copies of Part III if additional space is needed			
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	—	—	—
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
—	—	—	—
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	—	—	—
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
—	—	—	—
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	—	—	—
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
—	—	—	—
(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	—	—	—
(e) Transfer of gift			
Transferee's name, address, and ZIP 4		Relationship of transferor to transferee	
—	—	—	—

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

<b>(a)</b> List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	<b>(b)</b> How acquired P—Purchase D—Donation	<b>(c)</b> Date acquired (mo, day, yr)	<b>(d)</b> Date sold (mo, day, yr)
DELAWARE US GROWTH	D	2009-01-26	2013-10-14
DELAWARE US GROWTH	D	2009-01-26	2013-10-14
DELAWARE US GROWTH	D	2012-12-28	2013-11-15
DELAWARE US GROWTH	D	2009-01-26	2014-05-19
MANAGERS AMG FUNDS	D	2009-01-27	2013-11-18
MANAGERS AMG FUNDS	D	2009-01-27	2014-05-13
MANAGERS AMG FUNDS	D	2009-01-27	2014-05-16
JP MORGANMIDCAP	D	2009-01-27	2014-05-19

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

<b>(e) Gross sales price</b>	<b>(f) Depreciation allowed (or allowable)</b>	<b>(g) Cost or other basis plus expense of sale</b>	<b>(h) Gain or (loss) (e) plus (f) minus (g)</b>
600,000		223,127	376,873
800,889		283,584	517,305
463		352	111
288,736		100,359	188,377
1,200,000		518,321	681,679
852,752		433,758	418,994
673,364		308,366	364,998
29,706		12,033	17,673

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			<b>(I) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))</b>
<b>(i) F M V as of 12/31/69</b>	<b>(j) Adjusted basis as of 12/31/69</b>	<b>(k) Excess of col (i) over col (j), if any</b>	
			376,873
			517,305
			111
			188,377
			681,679
			418,994
			364,998
			17,673

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
AMERICAN JEWISH COMMITTEE 165 EAST 56TH STREET NEW YORK, NY 10022	NONE	PC	HONOR LEON COOPerman	2,500
BELL FOUNDATION 60 CLAYTON STREET DORCHESTER, MA 02122	NONE	PC	SUPPORT TALENT SHOW	10,000
BETH ISRAEL MEDICAL CENTE 330 BROOKLINE AVENUE BOSTON, MA 02210	NONE	PC	GENERAL	20,000
BETH MENACHEM CHABAD 349 DEDHAM STREET NEWTON, MA 02459	NONE	PC	GENERAL	15,000
BOSTON ARTS ACADEMY FOUNDATION 174 IPSWICH STREET BOSTON, MA 02215	NONE	PC	GENERAL	10,000
BOSTON CHILDRENS HOSPITAL 300 LONGWOOD AVENUE BOSTON, MA 02115	NONE	PC	IN MEMORY OF	26,000
BOSTON JEWISH FILM FESTIVAL 1001 WATERTOWN STREET NEW NEWTON, MA 02465	NONE	PC	FRIENDSATIONAL CELEBRATION	2,500
BOSTON PUBLIC LIBRARY 700 BOYLSTON STREET BOSTON, MA 02116	NONE	PC	ANNUAL	25,000
BOSTON UNIVERSITY SCHOOL ONE SHERBORN STREET 8TH BOSTON, MA 02215	NONE	PC	ANNUAL/MEDICAL SCHOOL	1,500,000
BRIGHAM & WOMEN'S HOSPITAL 1153 CENTRE STREET BOSTON, MA 02130	NONE	PC	GENERAL	100,000
BROOKLINE COMMUNITY MENTAL HEALTH 41 GARRISON ROAD BROOKLINE, MA 02445	NONE	PC	GENERAL	500
BROOKLINE FIREFIGHTERS ASSOC PO BOX 771 BROOKLINE VILLAGE, MA 02447	NONE	PC	RELIEF FUND	250
BUCKINGHAM BROWNE & NICHOLS 80 GERRYS LANDING ROAD CAMBRIDGE, MA 02138	NONE	PC	ANNUAL FUND	5,000
BUDDY DOG HUMANE SOCIETY PO BOX 296 SUDBURY, MA 01776	NONE	PC	GENERAL	500
CATHOLIC CHARITIES 51 SLEEPER STREET BOSTON, MA 02210	NONE	PC	SPRING CELEBRATION	5,000
<b>Total . . . . .</b>				3,903,002
			<b>► 3a</b>	

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
CATHOLIC SCHOOLS FOUNDATION 260 FRANKLIN STREET BOSTON, MA 02110	NONE	PC	INNER CITY SCHOLARSHIP FUND	15,000
CF AND MS FUND FOUNDATION 26 OVERLOOK LANE GUILFORD, CT 06437	NONE	PC	GENERAL	500
COMBINED JEWISH PHILANTHROPIES 126 HIGH STREET BOSTON, MA 02110	NONE	PC	ANNUAL APPEAL	105,000
DAMON RUNYON CANCER RESEA ONE EXCHANGE PLAZA NEW YORK, NY 10006	NONE	PC	GENERAL	301,970
EMERALD NECKLACE CNSERVANCY 125 FENWAY BOSTON, MA 02115	NONE	PC	IN HONOR OF	1,000
FUND FOR PARKS AND RECREATIN 1010 MASS AVENUE BOSTON, MA 02118	NONE	PC	ROSE GARDEN	10,000
HEADING HOME SCHRAFFT CENTER CHARLESTOWN, MA 02129	NONE	PC	HOUSEWARMING EVENT	20,000
HEBREW SENIOR LIFE 1200 CENTRE STREET BOSTON, MA 02131	NONE	PC	GENERAL	10,000
HONORABLE RICHARD J ELROD MEMORIAL 79 WEST MONROE STREET CHICAGO, IL 60603	NONE	PC	GENERAL	1,000
ISABELLA STEWART GARDNER MUSEUM 280 THE FENWAY BOSTON, MA 02115	NONE	PC	GENERAL	12,500
ISABORE NEWMAN SCHOOL 1903 JEFFERSON AVENUE NEW ORLEANS, LA 70115	NONE	PC	GENERAL	6,000
JEWISH COMMUNITY RELATIONS 126 HIGH STREET BOSTON, MA 02110	NONE	PC	IN HONOR OF	2,500
LEHIGH UNIVERSITY 27 MEMORIAL DRIVE WEST BETHLEHEM, PA 18015	NONE	PC	STACOM FAMILY SPEAKER SERIES	1,000
MA INSTITUTE OF TECHNOLOFY 77 MASS AVENUE CAMBRIDGE, MA 02139	NONE	PC	CENTER FOR ADVANCED URBANISM	1,105,000
MAPPING BOSTON INC 200 STATE STREET BOSTON, MA 02109	NONE	PC	STRATEGIC PLAN	89,039
<b>Total . . . . .</b>			<b>► 3a</b>	<b>3,903,002</b>

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
MELANOMA FOUNDATION OF NE 111 OLD ROAD TO NINE ACRE CONCORD, MA 01742	NONE	PC	GENERAL	5,000
MSPCA ANGELL 350 SOUTH HUNTINGTON AVEN BOSTON, MA 02130	NONE	PC	GENERAL	1,000
MUSEUM OF FINE ARTS BOSTON 465 HUNTINGTON AVENUE BOSTON, MA 02115	NONE	PC	GENERAL	3,000
NEIGHBORHOOD HOUSE CHARTER SCHOOL 21 QUEEN STREET DORCHESTER, MA 02122	NONE	PC	GENERAL	93,500
NEW ENGLAND AQUARIUM CENTRAL WHARF BOSTON, MA 02110	NONE	PC	GENERAL	10,000
NORTHWESTERN UNIVERSITY 2020 RIDGE AVENUE EVANSTON, IL 60208	NONE	PC	GENERAL	10,000
PAN MASS CHALLENGE 77 FOURTH AVENUE NEEDHAM, MA 02494	NONE	PC	GENERAL	2,750
PLANNED PARENTHOOD LEAGUE OF MA 1055 COMMONWEALTH AVENUE BOSTON, MA 02215	NONE	PC	GENERAL	500
SOJOURN TO THE PAST 300 PIEDMONT AVENUE SAN BRUNO, CA 94066	NONE	PC	GENERAL	500
ST FRANCIS HOUSE 39 BOYLSTON STREET BOSTON, MA 02116	NONE	PC	GENERAL	10,000
TEMPLE BETH ELOHIM 10 BETHEL ROAD WELLESLEY, MA 02481	NONE	PC	GENERAL	60,470
TEMPLE SHALOM OF NEWTON 175 TEMPLE STREET NEWTON, MA 02465	NONE	PC	ANNUAL FUNDS	3,273
TEST POSITIVE AWARE NETWORK 5050 N BROADWAY STREET CHICAGO, IL 60640	NONE	PC	RIDE FOR AIDS	500
THINK KIDS 151 MERRIMAC STREET BPSTPM, MA 02114	NONE	PC	RODMAN RIDE	1,000
TRUSTEES DARTMOUTH COLLEGE TUCK SCHOOL OF BUSINESS HANOVER, NH 03775	NONE	PC	GENERAL	25,000
<b>Total . . . . .</b>				3,903,002
			► 3a	

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a Paid during the year</b>				
TULANE UNIVERSITY TULANE EDUCATIONAL FUND 6823 ST CHARLES AVENUE NEW ORLEANS, LA 70118	NONE	PC	HEALTHCARE CENTER SUPPORT	224,000
TULANE UNIVERSITY TULANE EDUCATIONAL FUND 6823 ST CHARLES AVENUE NEW ORLEANS, LA 70118	NONE	PC	HELLUVA HULLABALOO	2,500
UNITED TO FIGHT PANCREATIC CANCER 1500 ROSECRAWS AVENUE MANHATTAN BEACH, CA 90266	NONE	PC	TEAM MICKEY	250
UNITED WAY OF MASS 51 SLEEPER STREET BOSTON, MA 02210	NONE	PC	GENERAL	25,000
WETA TELEVISION 3939 CAMPBELL AVENUE ARLINGTON, VA 22206	NONE	PC	GENERAL	20,000
WGBH ONE GUEST STREET BOSTON, MA 02135	NONE	PC	GENERAL	1,500
YARMOUTH FIREFIGHTERS AND RELIEF 96 OLD MAIN STREET SOUTH YARMOUTH, MA 02664	NONE	PC	GENERAL	500
<b>Total</b>			► 3a	3,903,002

## TY 2013 Accounting Fees Schedule

**Name:** SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION  
**EIN:** 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SANDBERG & CREDEN, P C - TAX	5,000	5,000		

## TY 2013 Compensation Explanation

**Name:** SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION  
**EIN:** 26-3358768

Person Name	Explanation
ALAN M LEVENTHAL	
SHERRY M LEVENTHAL	

## TY 2013 Investments Corporate Stock Schedule

**Name:** SHERRY AND ALAN LEVENTHAL FAMILY FOUNDATION  
**EIN:** 26-3358768

Name of Stock	End of Year Book Value	End of Year Fair Market Value
CASH	596,742	596,742
EQUITY FUNDS	3,018,807	1,404,590

## TY 2013 Legal Fees Schedule

**Name:** SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION  
**EIN:** 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	6,224	6,224		

## TY 2013 Other Decreases Schedule

**Name:** SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION  
**EIN:** 26-3358768

Description	Amount
UNREALIZED LOSS	2,403,258

## TY 2013 Other Expenses Schedule

**Name:** SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION  
**EIN:** 26-3358768

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
BANK FEES	75	75		
FILING FEES	500	500		
PORTFOLIO FEES	6,551	6,551		

## TY 2013 Other Increases Schedule

**Name:** SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION  
**EIN:** 26-3358768

Description	Amount
VOID CHECK TO GRANTEE 2010	2,500

## TY 2013 Other Professional Fees Schedule

**Name:** SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION  
**EIN:** 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
RIDGEWAY ADVISORS, LLC PROG AD	20,588			20,588

## TY 2013 Substantial Contributors Schedule

**Name:** SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION  
**EIN:** 26-3358768

Name	Address
ALAN M LEVENTHAL	200 STATE STREET 5TH FLOOR BOSTON, MA 02109

## TY 2013 Taxes Schedule

**Name:** SHERRY AND ALAN LEVENTHAL FAMILY  
FOUNDATION  
**EIN:** 26-3358768

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL TAXES 2013	22,003			
FEDERAL ESTIMATES 2014	23,000			
FEDERAL TAXES 2013 ASSESSMENTS	809			