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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 12-01-2013 , and ending 11-30-2014

Name of foundation
LEVINE FAMILY OF LAPORTE FOUNDATION

A Employer identification number
35-6030029

Number and street (or P O box number if mail is not delivered to street address)
201 WILLOW BEND DR

Room/suite

B Telephone number (see instructions)
(219) 362-4001

City or town, state or province, country, and ZIP or foreign postal code
LAPORTE, IN 46350

C If exemption application is pending, check here ▶ ☐

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

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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)* ▶$ 154,863

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))*

	Line	Description	(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)	10,092			
	2	Check ▶ ☐ if the foundation is **not** required to attach Sch B				
	3	Interest on savings and temporary cash investments	1	1		
	4	Dividends and interest from securities	6,090	6,090		
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	7,858			
	b	Gross sales price for all assets on line 6a 9,406				
	7	Capital gain net income (from Part IV, line 2)		7,858		
	8	Net short-term capital gain				
	9	Income modifications			600	
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)				
	12	**Total.** Add lines 1 through 11	24,041	13,949	600	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc				
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	1,240	1,240		
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	398	62		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	58	58		
	24	**Total operating and administrative expenses.** Add lines 13 through 23	1,696	1,360		0
	25	Contributions, gifts, grants paid	13,060			13,060
	26	**Total expenses and disbursements.** Add lines 24 and 25	14,756	1,360		13,060
	27	Subtract line 26 from line 12				
	a	**Excess of revenue over expenses and disbursements**	9,285			
	b	**Net investment income** (if negative, enter -0-)		12,589		
	c	**Adjusted net income** (if negative, enter -0-)			600	

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	3,481	6,395	6,395
	2	Savings and temporary cash investments	16,065	8,344	8,344
	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)	101,646	45,587	140,124
	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	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	121,192	60,326	154,863
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)		0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☑ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	121,192	60,326	
	30	**Total net assets or fund balances** (see page 17 of the instructions)	121,192	60,326	
	31	**Total liabilities and net assets/fund balances** (see page 17 of the instructions)	121,192	60,326	

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	121,192
2	Enter amount from Part I, line 27a	2	9,285
3	Other increases not included in line 2 (itemize) ▶	3	600
4	Add lines 1, 2, and 3	4	131,077
5	Decreases not included in line 2 (itemize) ▶	5	70,751
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	60,326

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	400 SH INTEL	P	1993-12-17	2014-02-10
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	9,406		1,548	7,858
b				
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) **or** Losses (from col (h))
	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a				7,858
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	7,858
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☑ No
If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	12,125	229,754	0 052774
2011	13,895	200,723	0 069225
2010	9,311	182,227	0 051096
2009	9,150	178,274	0 051325
2008	8,615	158,315	0 054417

2	**Total** of line 1, column (d).	2	0 278837
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 055767
4	Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	199,619
5	Multiply line 4 by line 3.	5	11,132
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	126
7	Add lines 5 and 6.	7	11,258
8	Enter qualifying distributions from Part XII, line 4.	8	13,060

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

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1 Date of ruling or determination letter ________ **(attach copy of letter if necessary–see instructions)**		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☑ and enter 1% of Part I, line 27b	1	126
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	126
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	126
6	Credits/Payments		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	
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	
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	126
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	
11	Enter the amount of line 10 to be **Credited to 2014 estimated tax** ▶ **Refunded** ▶	11	

Part VII-A **Statements Regarding Activities**

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

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

		Line	Yes	No
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 ▶MAURICE G LEVINE Telephone no ▶(219) 362-4001

Located at ▶201 WILLOW BEND DR LAPORTE IN ZIP+4 ▶46350

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 |

		Line	Yes	No
16	At any time during calendar year 2013, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		No
	See instructions for exceptions and filing requirements for Form TD F 90-22 1 If "Yes", enter the name of the foreign country ▶			

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

		Line	Yes	No
	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			
1a	During the year did the foundation (either directly or indirectly)			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☑ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☑ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☑ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☑ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☑ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). ☐ Yes ☑ No			
b	If any answer is "Yes" to 1a(1)–(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?	1b		
	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? ☐ 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		
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		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

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

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☑ No			
	(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☑ No			
	(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☑ No			
	(4) Provide a grant to an organization other than a charitable, etc, organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see instructions) ☐ Yes ☑ No			
	(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☑ No			
b	If any answer is "Yes" to 5a(1)–(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	**5b**		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? ☐ Yes ☐ No			
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).			
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☑ No			
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		No
	If "Yes" to 6b, file Form 8870.			
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☑ No			
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	**7b**		

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
MAURICE G LEVINE 201 WILLOW BEND DR LAPORTE, IN 46350	PRESIDENT 1 00	0	0	0
MARICA D LEVINE 201 WILLOW BEND DR LAPORTE, IN 46350	TREASURER 1 00	0	0	0
JUDY JACOBI 201 WILLOW BEND DR LAPORTE, IN 46350	SECRETARY 1 00	0	0	0
MARK JACOBI 201 WILLOW BEND DR LAPORTE, IN 46350	VICE PRES 1 00	0	0	0

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

(a) Name and address of each employee paid more than $50,000	**(b)** Title, and average hours per week devoted to position	**(c)** Compensation	**(d)** Contributions to employee benefit plans and deferred compensation	**(e)** Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶

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

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".

(a) Name and address of each person paid more than $50,000	**(b)** Type of service	**(c)** Compensation
NONE		
Total number of others receiving over $50,000 for professional services . . . . ▶		

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1	
2	
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 N/A	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3 . . . . ▶	

Part X **Minimum Investment Return** (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities	1a	185,517
b	Average of monthly cash balances	1b	17,142
c	Fair market value of all other assets (see instructions)	1c	0
d	**Total** (add lines 1a, b, and c)	1d	202,659
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	202,659
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	3,040
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	199,619
6	**Minimum investment return.** Enter 5% of line 5	6	9,981

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	9,981
2a	Tax on investment income for 2013 from Part VI, line 5	2a	126		
b	Income tax for 2013 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	126
3	Distributable amount before adjustments Subtract line 2c from line 1			3	9,855
4	Recoveries of amounts treated as qualifying distributions			4	600
5	Add lines 3 and 4			5	10,455
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	10,455

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	13,060
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	13,060
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	126
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	12,934

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					10,455
2 Undistributed income, if any, as of the end of 2013					
a Enter amount for 2012 only.					
b Total for prior years 20___ , 20___ , 20___					
3 Excess distributions carryover, if any, to 2013					
a From 2008.	1,120				
b From 2009.	757				
c From 2010.	328				
d From 2011.	4,749				
e From 2012.	973				
f **Total** of lines 3a through e.		7,927			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ $ 13,060					
a Applied to 2012, but not more than line 2a					
b Applied to undistributed income of prior years (Election required—see instructions).					
c Treated as distributions out of corpus (Election required—see instructions).					
d Applied to 2013 distributable amount.					10,455
e Remaining amount distributed out of corpus		2,605			
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		10,532			
b Prior years' undistributed income Subtract line 4b from line 2b					
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.					
d Subtract line 6c from line 6b Taxable amount —see instructions					
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions					
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014					0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)					
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions) . . .		1,120			
9 **Excess distributions carryover to 2014.** Subtract lines 7 and 8 from line 6a		9,412			
10 Analysis of line 9					
a Excess from 2009. . . .	757				
b Excess from 2010. . . .	328				
c Excess from 2011. . . .	4,749				
d Excess from 2012. . . .	973				
e Excess from 2013. . . .	2,605				

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2013, enter the date of the ruling. . . . . . . ▶

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

	Tax year	Prior 3 years			(e) Total
	(a) 2013	**(b)** 2012	**(c)** 2011	**(d)** 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon					
a "Assets" alternative test—enter **(1)** Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter **(1)** Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

NONE

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

NONE

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

MAURICE G LEVINE
201 WILLOW BEND DR
LAPORTE, IN 46350
(219) 362-4001

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

SUBMIT IN WRITING INCLUDE PURPOSE FOR WHICH FUNDS WILL BE USED

c Any submission deadlines

OCTOBER 15 OF EACH YEAR FOR THE FOLLOWING YEAR

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

EDUCATION, HEALTH CARE, RELIGIOUS PURPOSES - PRIMARILY IN NORTHERN INDIANA

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* See Additional Data Table				
Total . . . . ▶ **3a**				13,060
b *Approved for future payment*				
Total . . . . ▶ **3b**				

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	1	
4 Dividends and interest from securities			14	6,090	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					7,858
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				6,091	7,858

13 Total. Add line 12, columns (b), (d), and (e) 13 13,949

(See worksheet in line 13 instructions to verify calculations)

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

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

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

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

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

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

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

b If "Yes," complete the following schedule

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

Sign Here

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

****** | 2015-02-26 | ******

Signature of officer or trustee | Date | Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ▶	PTIN
STEPHEN L HAYES CPA		2015-03-13	☐	P00775006

Firm's name ▶ CHALMERS & KENDALL CPA'S | Firm's EIN ▶ 38-1984553

Firm's address ▶ 25240 LAHSER RD STE 3 SOUTHFIELD, MI 48033 | Phone no (248) 353-9353

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
ANTI-DEFAMATION LEAGUE 605 THIRD AVE NEW YORK, NY 10158			EDUCATION	200
ARTIS-NAPLES BAKER MUSEUM 5833 PELICAN BAY BLVD NAPLES, FL 34108			ARTS	250
CENTER FOR THE PERFORMING ARTS 26100 OLD 41 RD BONITA SPRINGS, FL 34135			ARTS	1,000
INDIANA JEWISH HISTORICAL SOCIETY 6301 CONSTITUTION DR FORT WAYNE, IN 46804			HISTORY	250
CONGREGATION B'NE ZION 201 WILLOW BEND DR LAPORTE, IN 46350			CEMETERY	1,000
DOCTORS WITHOUT BORDERS 333 SEVENTH AVE NEW YORK, NY 10001			WORLD MEDICINE	200
LAPORTE COUNTY HISTORICAL SOCIETY 2405 INDIANA AVE LAPORTE, IN 46350			HISTORY	500
HARMONY HOUE CASA 1005 MICHIGAN AVE LAPORTE, IN 46350			COMMUNITY	100
LUBEZNIK CENTER FOR THE ARTS 101 WEST 2ND ST MICHIGAN CITY, IN 46360			ARTS	250
MICHIGAN CITY CHAMBER MUSIC FESTIVA PO BOX 896 MICHIGAN CITY, IN 46361			ARTS	200
LAPORTE CITY PARK FOUNDATION 250 PINE LAKE AVE LAPORTE, IN 46350			COMMUNITY	350
NAPLES COUNCIL ON WORLD AFFAIRS 12290 TREELINE AVE FORT MYERS, FL 33913			EDUCATION	300
LAPORTE COUNTY PARK FOUNDATION PO BOX 419 MICHIGAN CITY, IN 46361			COMMUNITY	100
LAPORTE COUNTY CONSERVATION TRUST PO BOX 367 LAPORTE, IN 46352			ENVIRONMENTAL	100
PURDUE UNIVERSITY FOUNDATION PURDUE NORTH CENTRAL 1401 S US HWY 421 WESTVILLE, IN 46391			ARTS / EDUCATION	3,400
Total . . . . ▶ **3a**				13,060

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
LAPORTE LITTLE THEATER 218 A ST LAPORTE,IN 46350			ARTS	190
SCHOLASTIC CHESS OF INDIANA C/O STEVE STEPPE 53 E ANTLER DR TERRE HAUTE,IN 47802			EDUCATION	1,000
SIMON WEISENTHAL CENTER 1399 SOUTH ROXBURY DR LOS ANGELES,CA 90035			EDUCATION	100
THE FOUNDATION IU HEALTH LAPORTE 1007 LINCOLN WAY LAPORTE,IN 46350			HEALTHCARE	600
THE NATURE CONSERVANCY 4245 N FAIRFAX DR ARLINGTON,VA 22203			ENVIRONMENTAL	100
THE SALVATION ARMY 3180 ESTEY AVE NAPLES,FL 34104			COMMUNITY	200
THE SALVATION ARMY 3240 MONROE ST LAPORTE,IN 46350			COMMUNITY	100
UNITED STATES HOLOCAUST MUSEUM 100 RAOUL WALLENBERG PL WASHINGTON,DC 20024			EDUCATION	100
UNITED WAY OF LAPORTE COUNTY 115 EAST 4TH ST MICHIGAN CITY,IN 46360			COMMUNITY SUPPORT	2,150
WGCU PBS & NPR 10501 FGCU BLVD SOUTH FORT MYERS,FL 33965			PUBLIC SERVICE	220
WTTW PBS 5400 N ST LOUIS AVE CHICAGO,IL 60625			PUBLIC SERVICE	50
WVPE NPR RADIO STATION 2424 CALIFORNIA RD ELKHART,IN 46512			PUBLIC SERVICE	50
Total . . . . ▶ **3a**				13,060

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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*.

OMB No 1545-0047

2013

Name of the organization
LEVINE FAMILY OF LAPORTE FOUNDATION

Employer identification number
35-6030029

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 1/3% 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
LEVINE FAMILY OF LAPORTE FOUNDATION

Employer identification number
35-6030029

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	MAURICE G LEVINE 201 WILLOW BEND DR LAPORTE, IN 46350	$ 8,992	Person ☐ Payroll ☐ Noncash ☑ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)

Name of organization
LEVINE FAMILY OF LAPORTE FOUNDATION

Employer identification number
35-6030029

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	200 SH WELLS FARGO	$ 8,992	2013-12-20

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		$	

Name of organization
LEVINE FAMILY OF LAPORTE FOUNDATION

Employer identification number
35-6030029

Part III *Exclusively* **religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year.** Complete columns **(a)** through **(e) and** the following line entry
For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **$1,000 or less** 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

TY 2013 Accounting Fees Schedule

Name: LEVINE FAMILY OF LAPORTE FOUNDATION

EIN: 35-6030029

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CHALMERS & KENDALL, CPAS	1,240	1,240		

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TY 2013 Compensation Explanation

Name: LEVINE FAMILY OF LAPORTE FOUNDATION

EIN: 35-6030029

Person Name	Explanation
MAURICE G LEVINE	
MARICA D LEVINE	
JUDY JACOBI	
MARK JACOBI	

TY 2013 Investments Corporate Stock Schedule

Name: LEVINE FAMILY OF LAPORTE FOUNDATION

EIN: 35-6030029

Name of Stock	End of Year Book Value	End of Year Fair Market Value
600 SH ABBOTT LAB		
400 SH ABBOTT LAB	1,134	17,804
600 SH ABBVIE		
500 SH ABBBIE	1,531	34,600
9 SH AMGEN		
67 SH AMGEN	6,182	11,076
500 SH COCA COLA		
800 SH GENERAL ELECTRIC		
600 SH GENERAL ELECTRIC	11,347	15,894
600 SH INTEL		
600 SH ISHARES		
400 SH MICROSOFT		
300 SH MICROSOFT	8,379	14,343
300 SH NATIONAL GRID ADR		
200 SH NOVARTIS		
150 SH NOVARTIS	5,626	14,497
400 SH VERIZON		
200 SH VERIZON	7,689	10,118
400 SH WELLS FARGO	3,699	21,792
151 SH YUM BRANDS		

TY 2013 Other Decreases Schedule

Name: LEVINE FAMILY OF LAPORTE FOUNDATION

EIN: 35-6030029

Description	Amount
FMV OF SECURITIES IN EXCESS OF DONOR'S BASIS	9,808
PARTIAL LIQUIDATION OF ASSETS	60,943

TY 2013 Other Expenses Schedule

Name: LEVINE FAMILY OF LAPORTE FOUNDATION

EIN: 35-6030029

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
EXPENSES				
ADMINISTRATIVE EXPENSES	58	58		

TY 2013 Other Increases Schedule

Name: LEVINE FAMILY OF LAPORTE FOUNDATION

EIN: 35-6030029

Description	Amount
RECOVERIES	600

TY 2013 Taxes Schedule

Name: LEVINE FAMILY OF LAPORTE FOUNDATION

EIN: 35-6030029

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX WITHHELD	62	62		
EXCISE TAX	336			

LEVINE FAMILY OF LA PORTE FOUNDATION, INC. ANNUAL MEETING

October 5, 2014, 3:20 p.m.

The meeting was called to order by the president, Maurice Levine. Present were Judy Jacobi, Secretary; Marcia Levine, Treasurer; Mark Jacobi, Director.

Minutes of the previous Annual Meeting, October 18, 2013, were read and approved. A motion to approve was made by Mark Jacobi and seconded by Maurice Levine.

The Treasurer reported total assets on September 30, 2013 were as follows:

Fidelity Investments	$184,469
Horizon Checking Acct.	2,305
Unity Foundation Fund	84,406
TOTAL	**$271,180**

Thanks to a vibrant stock market, this total is 18.5% over last year's $228,821

Last year the decision was made to begin phasing out our Foundation in view of our president's age and that fact that he personally handles the Investment Portfolio and the distribution of funds to the many charities we support.

In December 21013, we transferred $80,331 in stock to Unity Foundation. They sold the stock for $80,178 after expenses which became our Beginning Fund Balance, as per the attached report. We ordered them to send three donations of $250 each to three local charities in the spring as a test for future donations. The rest of our donations to date were made with cash in the Fidelity Brokerage account. These amounted to $12,150 which exceeds our required donations before the end of our fiscal year, 11/30/14.

Therefore, there will be very few donations made until after our fiscal year closes on November 30, including the 4th payment on our $12,500 pledge for Purdue North Central's Student Activities building. That building will come to fruition with a ground-breaking ceremony on October 16, with completion expected in May, 2016

A discussion was held whether to give the balance of the portfolio to Unity this year or to give them a portion of the funds now and continue operating the foundation for another year or two Dr Jacobi suggested we give $20,000 this year, but Mr Levine said he preferred to make it closer to $40,000 which will still allow us to have ample funds for a large donation or two in 2015.

There being no further business, a motion was made and carried to adjourn the meeting at 4:00 p.m..

Respectfully submitted,

LFF MINUTES 10 6 14

Judy Jacobi, Secretary

LEVINE FAMILY OF LA PORTE FOUNDATION, INC.
ANNUAL MEETING

October 18, 2013, 5:15 p.m.

The meeting was called to order by the president, Maurice Levine Present were Judy Jacobi, Secretary; Marcia Levine, Treasurer; Mark Jacobi, Director.

Minutes of the previous Annual Meeting, August 26, 2012, were read and approved. A motion to approve was made by Mark Jacobi and seconded by Maurice Levine.

The Treasurer reported total assets on September 30, 2013 were $228,821 00. This amount is slightly higher than last year by about $3,000. It should be noted that our donations to date exceed those of last year, partly because our meeting is almost two months later this year . We are required to donate 5% of our average assets, but we usually exceed that percentage because there are so many worthwhile organizations needing our help. This year, our required will be around $11,000. We have already donated $13,705.

Therefore, there will be very few donations made until after our fiscal year closes on November 30, including the 3rd payment on our $12,500 pledge for Purdue North Central's Student Activities building. Added this year to our usual donations was $1,000 to B'ne Zion Cemetery and $500 to the Rumely Heritage Center which will be a museum dedicated to the Rumely and Allis-Chalmers farm equipment which put La Porte on the map during the 2nd half of the 19th and 1st half of the 20th Centuries.

As discussed last year, the Board needs to have a succession plan or a liquidation plan. So before this meeting began we met with Maggie Spartz who is president and CEO of Unity Foundation of La Porte County This community not-for-profit foundation has assets of $24M They are always looking to expand their fund and would welcome our participation. Our funds would operate as a Donor Advised Fund. The current return on our funds would be around 7%.. Each March we would be advised how much income is available to gift We would specify what charities are to receive specific amounts. All donations would be made in the name of the Levine Family of La Porte. We can give away all the income each year or accumulate the funds to make a larger gift in a later year.

The Board discussed the advantages of a professional staff handling the details or investing and making the donations. Anoother advantage is that we would not have to file federal income taxes each year which with accounting fees is in the neighborhood of $1500 to $1800 annually.

Mark and Judy will donate $1000 in stock to the Foundation, as they have for many years. Maurice and Marcia will donate 200 shares of Wells Fargo Bank stock which is valued at $8600. (the actual value at the date of the gift in December was $8992.00).

An election of officers was held. Mark Jacobi moved that we reelect the entire slate, President, Maurice Levine; Vice-President, Mark Jacobi; Secretary, Judy Jacobi; Treasurer, Marcia Levine. Maurice Levine seconded the motion and all were re-elected by aclamation.

There being no further business, a motion was made and carried to adjourn the meeting at 6.00.

Respectfully submitted,

LFF MINUTES 10.18.13

Judy Jacobi, Secretary

December 10, 2014

Unity Foundation of LaPorte County
Attn: Sandy
115 E. 4^{th} Street
Michigan City, IN 46360

Re: Stock Gift

Dear Sandy:

On Friday, November 28, 2014 after trading, we received the following stock gifts into the Unity Foundation Gift Account. The shares were sold on Tuesday, December 2, 2014. The full detail of the activities are as follows:

Gift value of 300 shares Coca Cola Company gifted on Friday, November 28, 2014, at the mean value of $44.575 per share (based on a high of $45.00 and low of $44.15 on that date)	$	13,372.50
Sold on December 2, 2014 @ $44.4134/share	$	13,324.02
Less: Commission	-	18.00
Security Charges	-	0.30
Net Proceeds	$	13,305.72
Gift value of 200 shares National Grid PLC gifted on Friday, November 28, 2014, at the mean value of $72.945 per share (based on a high of $73.31 and low of $72.58 on that date)	$	14,589.00
Sold on December 2, 2014 @ $72.9571/share	$	14,591.42
Less: Commission	-	12.00
Security Charges	-	0.33
Net Proceeds	$	14,579.09

Gift value of 100 shares Verizon Communications Inc. gifted on Friday, November 28, 2014, at the mean value of $50.50 per share (based on a high of $50.80 and low

of \$50.20 on that date)	\$	5,050.00
Sold on December 2, 2014 @ \$49.715/share	\$	4,971.50
Less: Commission	-	6.00
Security Charges	-	0.11
Net Proceeds	\$	4,965.39
Gift value of 300 shares iShares S&P US Preferred Stk Index gifted on Friday, November 28, 2014, at the mean value of \$40.09 per share (based on a high of \$40.15 and low of \$40.03 on that date)	\$	12,027.00
Sold on December 2, 2014 @ \$39.7436/share	\$	11,923.08
Less: Commission	-	18.00
Security Charges	-	0.27
Net Proceeds	\$	11,904.81

6014
6013
12027

Please feel free to contact me at (219) 874-9232 if you have any questions regarding this transaction.

Duane
Duane G. Mertl
Vice President &
Trust Officer

Gift Value 45038.50

December 18, 2013

Unity Foundation of LaPorte County
Attn: Sandy Gleim
115 E. 4th Street
Michigan City, IN 46360

Re: Maurice Levine Stock Gifts

Dear Sandy:

On late afternoon of December 12, 2013, we received a variety of stock gifts into the Unity Foundation gift account from Maurice Levine. The shares were sold on December 13, 2013. The full details of the activity are as follows:

Gift value of 200 shares Abbott Labs., gifted on December 12, 2013, at the mean value of \$36.45 per share (based on a high of \$36.63 and low of \$36.27 on that date)	$	7,290.00
Sold on December 13, 2013 @ \$36.3938/share	$	7,278.76
Less: Commission		- 12.00
Security Charges		- .13
Net Proceeds	$	7,266.63
Gift value of 100 shares Abbvie Inc., gifted on December 12, 2013, at the mean value of \$52.21 per share (based on a high of \$52.62 and low of \$51.80 on that date)	$	5,221.00
Sold on December 13, 2013 @ \$52.06/share	$	5,206.00
Less: Commission		- 5.00
Security Charges		- .10
Net Proceeds	$	5,200.90

Gift value of 50 shares Novartis AG Spon. ADR, gifted on
December 12, 2013, at the mean value of \$76.93 per share
(based on a high of \$77.44 and low of \$76.42 on that

date) $ 3,846.50

Sold on December 13, 2013 @ $76.57/share $ 3,828.50
Less: Commission − 3.00
Security Charges − .07

Net Proceeds $ 3,825.43

Gift value of 100 shares Verizon Communications, gifted on December 12, 2013, at the mean value of $48.20 per share (based on a high of $48.53 and low of $47.87 on that date) $ 4,820.00

Sold on December 13, 2013 @ $47.7327/share $ 4,773.27
Less: Commission − 6.00
Security Charges − .09

Net Proceeds $ 4,767.18

Gift value of 200 shares Wells Fargo & Co., gifted on December 12, 2013, at the mean value of $43.625 per share (based on a high of $43.78 and low of $43.47 on that date) $ 8,725.00

Sold on December 13, 2013 @ $43.5925/share $ 8,718.50
Less: Commission − 12.00
Security Charges − .16

Net Proceeds $ 8,706.34

Gift value of 200 shares Coca Cola Co., gifted on December 12, 2013, at the mean value of $39.695 per share (based on a high of $40.21 and low of $39.18 on that date) $ 7,939.00

Sold on December 13, 2013 @ $39.405/share $ 7,881.00
Less: Commission − 12.00
Security Charges − .14

Net Proceeds $ 7,868.86

Gift value of 200 shares General Electric Co., gifted on December 12, 2013, at the mean value of $26.59 per share (based on a high of $26.70 and low of $26.48 on that date) $ 5,318.00

Sold on December 13, 2013 @ $26.575/share	$	5,315.00
Less: Commission	–	12.00
Security Charges	–	.10
Net Proceeds	$	5,302.90

Gift value of 200 shares Intel Corp., gifted on December 12, 2013, at the mean value of $24.655 per share (based on a high of $24.89 and low of $24.42 on that date) $ 4,931.00

Sold on December 13, 2013 @ $24.3227/share	$	4,864.54
Less: Commission	–	10.00
Security Charges	–	.09
Net Proceeds	$	4,854.45

Gift value of 300 shares iShares S&P Pfd. Stock ETF, gifted on December 12, 2013, at the mean value of $37.27 per share (based on a high of $37.36 and low of $37.18 on that date) $ 11,181.00

Sold on December 13, 2013 @ $37.2925/share	$	11,187.75
Less: Commission	–	18.00
Security Charges	–	.20
Net Proceeds	$	11,169.55

Gift value of 100 shares Microsoft Corp., gifted on December 12, 2013, at the mean value of $37.41 per share (based on a high of $37.64 and low of $37.18 on that date) $ 3,741.00

Sold on December 13, 2013 @ $36.8825/share	$	3,688.25
Less: Commission	–	5.00
Security Charges	–	.07
Net Proceeds	$	3,683.18

Gift value of 100 shares National Grid PLC Spon. ADR, gifted on December 12, 2013, at the mean value of $61.51 per share (based on a high of $61.88 and low of $61.14 on that date)	$	6,151.00
Sold on December 13, 2013 @ $61.3561/share	$	6,135.61
Less: Commission		− 6.00
Security Charges		− .11
Net Proceeds	$	6,129.50
Gift value of 151 shares Yum Brands, Inc., gifted on December 12, 2013, at the mean value of $72.195 per share (based on a high of $72.89 and low of $71.50 on that date)	$	10,901.44
Sold on December 13, 2013 @ $71.8846/share	$	10,854.57
Less: Commission		− 9.06
Security Charges		− .19
Net Proceeds	$	10,845.32

Please feel free to contact me at (219) 874-9232 if you have any questions regarding this transaction

Duane
Duane G. Mertl
Vice President &
Trust Officer

Gift Value 8006 4.94