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Form **990-PF**

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

OMB No 1545-0052

**2014**

Department of the Treasury  
Internal Revenue Service

▶ Do not enter social security numbers on this form as it may be made public.  
▶ Information about Form 990-PF and its separate instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

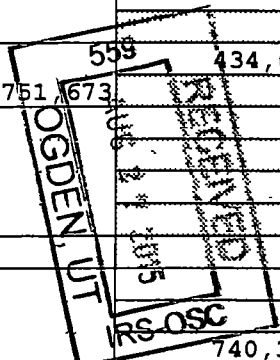
Open to Public Inspection

For calendar year 2014 or tax year beginning , and ending

Name of foundation <b>Joseph L Lewith Trust Estate</b>		A Employer identification number <b>91-6061781</b>
Number and street (or P O box number if mail is not delivered to street address) <b>126 - 3rd Ave South</b>	Room/suite <b>102</b>	B Telephone number (see instructions) <b>425-774-7739</b>
City or town, state or province, country, and ZIP or foreign postal code <b>Edmonds WA 98020</b>		C If exemption application is pending, 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		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
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		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ <b>\$ 13,622,365</b>	J Accounting method: <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
(Part I, column (d) must be on cash basis)		

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received (attach schedule)				
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments	2	2	2	
4 Dividends and interest from securities	305,715	228,472	305,715	
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	434,614			
b Gross sales price for all assets on line 6a	5,751,673			
7 Capital gain net income (from Part IV, line 2)		434,614		
8 Net short-term capital gain			45,372	
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss) (attach schedule)				
11 Other income (attach schedule)				
12 Total. Add lines 1 through 11	740,331	663,088	351,089	
13 Compensation of officers, directors, trustees, etc.	132,500	21,000	21,000	111,500
14 Other employee salaries and wages	117,533			117,533
15 Pension plans, employee benefits	23,788	1,607	1,607	22,181
16a Legal fees (attach schedule) See Stmt 1	14,905			14,905
b Accounting fees (attach schedule) Stmt 2	18,385			18,385
c Other professional fees (attach schedule) Stmt 3	100,211	97,849	97,849	2,362
17 Interest	3	3	3	
18 Taxes (attach schedule) (see instructions) Stmt 4	12,567			484
19 Depreciation (attach schedule) and depletion				
20 Occupancy	99,078			99,078
21 Travel, conferences, and meetings	12,412	1,500	1,500	10,912
22 Printing and publications				
23 Other expenses (att. sch) Stmt 5	2,762	1,379	1,379	1,383
24 Total operating and administrative expenses. Add lines 13 through 23	534,144	123,338	123,338	398,723
25 Contributions, gifts, grants paid	210,546			210,546
26 Total expenses and disbursements. Add lines 24 and 25	744,690	123,338	123,338	609,269
27 Subtract line 26 from line 12:				
a Excess of revenue over expenses and disbursements	-4,359			
b Net investment income (if negative, enter -0-)		539,750		
c Adjusted net income (if negative, enter -0-)			227,751	

SCANNED AUG 31 2015 Revenue



5

**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
<b>Assets</b>				
1 Cash – non-interest-bearing	79,816	23,979	23,979	
2 Savings and temporary cash investments	630,134	309,294	309,294	
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 (att. schedule) ▶ <b>See Wrk</b> Less: allowance for doubtful accounts ▶	0 3,300			
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) <b>See Stmt 6</b>	4,336,805	3,728,383	4,407,490	
c Investments – corporate bonds (attach schedule) <b>See Stmt 7</b>	2,304,465	2,184,834	2,206,882	
11 Investments – land, buildings, and equipment: basis ▶ Less: accumulated depreciation (attach sch) ▶				
12 Investments – mortgage loans				
13 Investments – other (attach schedule) <b>See Statement 8</b>	3,586,810	4,673,174	4,911,720	
14 Land, buildings, and equipment: basis ▶ <b>704,534</b> Less: accumulated depreciation (attach sch) ▶ <b>Stmt 9</b>	687,770	704,534	1,750,000	
15 Other assets (describe ▶ <b>See Statement 10</b> )	17,293	12,999	13,000	
16 <b>Total assets</b> (to be completed by all filers – see the instructions Also, see page 1, item I)	11,646,393	11,637,197	13,622,365	
<b>Liabilities</b>				
17 Accounts payable and accrued expenses	4,588	938		
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 ▶ <b>See Statement 11</b> )	1,187			
23 <b>Total liabilities</b> (add lines 17 through 22)	5,775	938		
<b>Net Assets or Fund Balances</b>				
Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ <input type="checkbox"/>				
24 Unrestricted				
25 Temporarily restricted				
26 Permanently restricted				
Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ <input checked="" type="checkbox"/>				
27 Capital stock, trust principal, or current funds				
28 Paid-in or capital surplus, or land, bldg., and equipment fund	733,307	733,307		
29 Retained earnings, accumulated income, endowment, or other funds	10,907,311	10,902,952		
30 <b>Total net assets or fund balances</b> (see instructions)	11,640,618	11,636,259		
31 <b>Total liabilities and net assets/fund balances</b> (see instructions)	11,646,393	11,637,197		

**Part III Analysis of Changes in Net Assets or Fund Balances**

1 Total net assets or fund balances at beginning of year – Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	11,640,618
2 Enter amount from Part I, line 27a	2	-4,359
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	11,636,259
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	11,636,259

**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.)
<b>1a See Worksheet</b>			
<b>b</b>			
<b>c</b>			
<b>d</b>			
<b>e</b>			

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

<b>2</b> Capital gain net income or (net capital loss) <span style="font-size: 2em;">}</span> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	<b>2</b>	<b>434,614</b>
<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 <span style="font-size: 2em;">}</span>	<b>3</b>	<b>45,372</b>

**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.

(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))
2013	567,275	10,563,615	0.053701
2012	369,168	11,266,144	0.032768
2011	192,589	5,345,162	0.036031
2010	315,576	4,385,914	0.071952
2009	222,034	3,876,580	0.057276

<b>2</b> Total of line 1, column (d)	<b>2</b>	<b>0.251728</b>
<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>	<b>0.050346</b>
<b>4</b> Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	<b>4</b>	<b>9,664,679</b>
<b>5</b> Multiply line 4 by line 3	<b>5</b>	<b>486,578</b>
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	<b>5,398</b>
<b>7</b> Add lines 5 and 6	<b>7</b>	<b>491,976</b>
<b>8</b> Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions	<b>8</b>	<b>626,033</b>

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

<b>1a</b>	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary—see instructions)		
<b>b</b>	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b	<b>1</b>	<b>5,398</b>
<b>c</b>	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	<b>0</b>
<b>3</b>	Add lines 1 and 2	<b>3</b>	<b>5,398</b>
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	<b>0</b>
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0-	<b>5</b>	<b>5,398</b>
<b>6</b>	<b>Credits/Payments:</b>		
<b>a</b>	2014 estimated tax payments and 2013 overpayment credited to 2014	<b>6a</b>	<b>13,000</b>
<b>b</b>	Exempt foreign organizations - tax withheld at source	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868)	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d	<b>7</b>	<b>13,000</b>
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b>	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b>	<b>10</b>	<b>7,602</b>
<b>11</b>	Enter the amount of line 10 to be <b>Credited to 2015 estimated tax</b> <b>7,602</b> <b>Refunded</b>	<b>11</b>	

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		<b>X</b>
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? 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		<b>X</b>
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year?	N/A	
<b>d</b> Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation. <b>\$</b> _____ (2) On foundation managers <b>\$</b> _____		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <b>\$</b> _____		
<b>2</b> 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		<b>X</b>
<b>3</b> Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		<b>X</b>
<b>4a</b> Did the foundation have <b>unrelated business gross income</b> of \$1,000 or more during the year?	N/A	
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year?		
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		<b>X</b>
<b>6</b> Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	<b>X</b>	
<b>7</b> 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	<b>X</b>	
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) <b>WA</b>		
<b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	<b>X</b>	
<b>9</b> Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV	<b>X</b>	
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		<b>X</b>

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

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)			<b>X</b>
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)	N/A		
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► <b>No website.</b>		<b>X</b>	
14	The books are in care of ► <b>TR Tindall, CPA</b> <b>PO Box 968</b> Located at ► <b>Edmonds</b> <b>WA</b> ZIP+4 ► <b>98020</b> Telephone no ► <b>425-774-7739</b>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		
16	At any time during calendar year 2014, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22 1) If "Yes," enter the name of the foreign country ►		Yes	No <b>X</b>

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly):		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (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 any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here ► <input type="checkbox"/>	1b	<b>X</b>
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 2014?	1c	<b>X</b>
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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? If "Yes," list the years ► 20 , 20 , 20 , 20 <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
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.)	N/A	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ► 20 , 20 , 20 , 20		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 2014 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 2014.)	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	<b>X</b>
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 2014?	4b	<b>X</b>

**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 propoganda, 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 4945(d)(4)(A)? (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)? **N/A**  **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? **N/A**  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**

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? **N/A** **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
Salary/Trustee fee, CW Beresford 8509 - 224th St SW	Edmonds WA 98026	Trustee 25.00	100,000	0
Salary/Trustee fee, RR Beresford 145 3rd Ave S #200	Edmonds WA 98020	Trustee 6.00	32,500	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
Robert V. Beresford 2217 Hoyt Avenue	Everett WA 98201	Maintenance 30.00	51,442	0

Total number of other employees paid over \$50,000 **0**

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for professional services ▶

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 Operate home for aged widows: Direct Charitable Outlays	398,723
2 Main Facility: purchase of add'l personal property	
3 Expansion investigation of main facility	16,764
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 instructions	
3	

Total. Add lines 1 through 3 ▶



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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes.		
<b>a</b>	Average monthly fair market value of securities	<b>1a</b>	<b>4,836,694</b>
<b>b</b>	Average of monthly cash balances	<b>1b</b>	<b>335,659</b>
<b>c</b>	Fair market value of all other assets (see instructions)	<b>1c</b>	<b>4,639,504</b>
<b>d</b>	<b>Total</b> (add lines 1a, b, and c)	<b>1d</b>	<b>9,811,857</b>
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	<b>1e</b>	<b>0</b>
<b>2</b>	Acquisition indebtedness applicable to line 1 assets	<b>2</b>	<b>0</b>
<b>3</b>	Subtract line 2 from line 1d	<b>3</b>	<b>9,811,857</b>
<b>4</b>	Cash deemed held for charitable activities Enter 1½% of line 3 (for greater amount, see instructions)	<b>4</b>	<b>147,178</b>
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4	<b>5</b>	<b>9,664,679</b>
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5	<b>6</b>	<b>483,234</b>

**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 )

<b>1</b>	Minimum investment return from Part X, line 6	<b>1</b>	
<b>2a</b>	Tax on investment income for 2014 from Part VI, line 5	<b>2a</b>	
<b>b</b>	Income tax for 2014 (This does not include the tax from Part VI.)	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b	<b>2c</b>	
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1	<b>3</b>	
<b>4</b>	Recoveries of amounts treated as qualifying distributions	<b>4</b>	
<b>5</b>	Add lines 3 and 4	<b>5</b>	
<b>6</b>	Deduction from distributable amount (see instructions)	<b>6</b>	
<b>7</b>	<b>Distributable amount as adjusted.</b> Subtract line 6 from line 5 Enter here and on Part XIII, line 1	<b>7</b>	

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc. – total from Part I, column (d), line 26	<b>1a</b>	<b>609,269</b>
<b>b</b>	Program-related investments – total from Part IX-B	<b>1b</b>	
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	<b>2</b>	<b>16,764</b>
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required)	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule)	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	<b>4</b>	<b>626,033</b>
<b>5</b>	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)	<b>5</b>	<b>5,398</b>
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4	<b>6</b>	<b>620,635</b>

**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 2013	(c) 2013	(d) 2014
<b>1</b> Distributable amount for 2014 from Part XI, line 7				
<b>2</b> Undistributed income, if any, as of the end of 2014:				
<b>a</b> Enter amount for 2013 only				
<b>b</b> Total for prior years 20____, 20____, 20____				
<b>3</b> Excess distributions carryover, if any, to 2014:				
<b>a</b> From 2009				
<b>b</b> From 2010				
<b>c</b> From 2011				
<b>d</b> From 2012				
<b>e</b> From 2013				
<b>f</b> Total of lines 3a through e				
<b>4</b> Qualifying distributions for 2014 from Part XII, line 4: ▶ \$ <u>626,033</u>				
<b>a</b> Applied to 2013, 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 2014 distributable amount				
<b>e</b> Remaining amount distributed out of corpus	626,033			
<b>5</b> Excess distributions carryover applied to 2014 (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:				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	626,033			
<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 2013 Subtract line 4a from line 2a Taxable amount – see instructions				
<b>f</b> Undistributed income for 2014 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required—see instructions)				
<b>8</b> Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)				
<b>9</b> Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a				
<b>10</b> Analysis of line 9:				
<b>a</b> Excess from 2010				
<b>b</b> Excess from 2011				
<b>c</b> Excess from 2012				
<b>d</b> Excess from 2013				
<b>e</b> Excess from 2014				

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

<b>1a</b>	If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, enter the date of the ruling				<b>N/A</b>
<b>b</b>	Check box to indicate whether the foundation is a private operating foundation described in section <input checked="" type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)				
<b>2a</b>	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed				
	<b>Tax year</b>	<b>Prior 3 years</b>			<b>(e) Total</b>
	<b>(a) 2014</b>	<b>(b) 2013</b>	<b>(c) 2012</b>	<b>(d) 2011</b>	
	227,751	528,181	208,869	121,390	1,086,191
<b>b</b>	193,588	448,954	177,539	103,182	923,263
<b>c</b>	626,033	579,328	369,168	192,589	1,767,118
<b>d</b>	210,546	210,929	61,579		483,054
<b>e</b>	415,487	368,399	307,589	192,589	1,284,064
<b>3</b>	Complete 3a, b, or c for the alternative test relied upon				
<b>a</b>	"Assets" alternative test – enter.				
	(1) Value of all assets				
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
<b>b</b>	"Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				
	322,156	352,121	375,538	178,172	1,227,987
<b>c</b>	"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 foundation had \$5,000 or more in assets at any time during the year – see instructions.)

**1 Information Regarding Foundation Managers:**

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

**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.  
**N/A**

**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.  
**William Beresford 206-390-2674**  
**8509 - 224th St SW Edmonds WA 98026**

**b** The form in which applications should be submitted and information and materials they should include  
**General information explaining worthy cause.**

**c** Any submission deadlines:  
**None.**

**d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors  
**None.**

**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
<p>a Paid during the year  <b>See Attached Excel Schedule</b>                      Various                      Various WA 98020</p>	<p>None</p>	<p>501(c)(3)</p>	<p>See Attached Excel Spreadsheet</p>	<p>210,546</p>
<p><b>Total</b></p>				<p>▶ <b>3a</b> 210,546</p>
<p>b Approved for future payment                      N/A</p>				
<p><b>Total</b></p>				<p>▶ <b>3b</b></p>





## Capital Gains and Losses for Tax on Investment Income

Form **990-PF****2014**

For calendar year 2014, or tax year beginning

, and ending

Name

Employer Identification Number

**Joseph L Lewith Trust Estate****91-6061781**

(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) Comprehensive W Mgt Inv STCG distri	P	01/01/14	12/31/14
(2) Comprehensive W Mgt Inv LTCG distri	P	01/01/13	12/31/14
(3) Comprehensive W Mgt Inv (7984)	P	01/01/14	12/31/14
(4) Comprehensive W Mgt Inv (7984)	P	01/01/13	12/31/14
(5) Comprehensive W Mgt Op LTCG distr	P	01/01/13	12/31/14
(6) Comprehensive W Mgt Op (6589)	P	01/01/14	12/31/14
(7) Comprehensive W Mgt Op (6589)	P	01/01/13	12/31/14
(8) Seattle 1st	P	11/25/13	09/26/14
(9) Landa: STCG distribution	P	01/04/14	12/31/14
(10) Landa: LTCG distribution	P	01/01/13	12/31/14
(11) US Tr BAC: LTCG distribution	P	01/01/13	12/31/14
(12) US Tr BAC (6420)	P	01/01/14	12/31/14
(13) US Tr BAC (4339)	P	01/01/14	12/31/14
(14) US Tr BAC (4339)	P	01/01/13	12/31/14
(15)			

(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)
(1) 8,965			8,965
(2) 118,916			118,916
(3) 812,539		789,657	22,882
(4) 3,655,609		3,445,616	209,993
(5) 3,436			3,436
(6) 847,404		826,509	20,895
(7) 16,458		15,434	1,024
(8) 42,952		50,049	-7,097
(9) 3,420			3,420
(10) 27,742			27,742
(11) 28,250			28,250
(12) 149,299		150,354	-1,055
(13) 35,004		37,642	-2,638
(14) 1,679		1,798	-119
(15)			

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

(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	(l) Gains (Col (h) gain minus col (k), but not less than -0-) Or Losses (from col (h))
(1)			8,965
(2)			118,916
(3)			22,882
(4)			209,993
(5)			3,436
(6)			20,895
(7)			1,024
(8)			-7,097
(9)			3,420
(10)			27,742
(11)			28,250
(12)			-1,055
(13)			-2,638
(14)			-119
(15)			

**Federal Statements**

**Statement 1 - Form 990-PF, Part I, Line 16a - Legal Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Legal	\$ 14,905	\$	\$	\$ 14,905
Total	\$ 14,905	\$ 0	\$ 0	\$ 14,905

**Statement 2 - Form 990-PF, Part I, Line 16b - Accounting Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Accounting	\$ 18,385	\$	\$	\$ 18,385
Total	\$ 18,385	\$ 0	\$ 0	\$ 18,385

**Statement 3 - Form 990-PF, Part I, Line 16c - Other Professional Fees**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
CWMin	\$ 57,860	\$ 57,860	\$ 57,860	\$
Seattle 1st	6,477	6,477	6,477	
US Tr BAC (6420)	11,999	11,999	11,999	
Payroll svc	2,362			2,362
CWMop	20,379	20,379	20,379	
US Tr BAC (4339)	1,134	1,134	1,134	
Total	\$ 100,211	\$ 97,849	\$ 97,849	\$ 2,362



**Federal Statements**

**Statement 4 - Form 990-PF, Part I, Line 18 - Taxes**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Tax - Real Estate	\$ 484	\$	\$	484
Federal Excise Tax	12,083			
<b>Total</b>	<b>\$ 12,567</b>	<b>\$ 0</b>	<b>\$ 0</b>	<b>\$ 484</b>

**Statement 5 - Form 990-PF, Part I, Line 23 - Other Expenses**

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
Expenses	\$	\$	\$	\$
Bk Service charges	222	111	111	111
Dues/subscriptions	759	379	379	380
Office	24	12	12	12
Trustee - bonding	1,760	880	880	880
Rndg	-3	-3	-3	
<b>Total</b>	<b>\$ 2,762</b>	<b>\$ 1,379</b>	<b>\$ 1,379</b>	<b>\$ 1,383</b>

**Statement 6 - Form 990-PF, Part II, Line 10b - Corporate Stock Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CWM: Oper - Equity (6589)	\$ 45,317	\$	Cost	\$
CWM: Invest - Equity Fds (7984)	3,114,413	2,560,893	Cost	2,698,833
Seattle First Asset Mgt - Equity	1,078,235	1,072,255	Cost	1,605,222
US Trust: Equities (4339)	98,840	95,235	Cost	103,435
<b>Total</b>	<b>\$ 4,336,805</b>	<b>\$ 3,728,383</b>		<b>\$ 4,407,490</b>

**Federal Statements**

**Statement 7 - Form 990-PF, Part II, Line 10c - Corporate Bond Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CWM: Invest - Bd Fds (7984)	\$ 2,261,298	\$ 2,184,821	Cost	\$ 2,206,882
CWM: Oper - Bd Fds (6589)	43,167	13	Cost	
Total	\$ 2,304,465	\$ 2,184,834		\$ 2,206,882

**Statement 8 - Form 990-PF, Part II, Line 13 - Other Investments**

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
CWM: Invest - Other (7984) Clearing	\$	\$ 376,510	Cost	\$ 376,510
CWM: Oper - Other (6589) Clearing		30,568	Cost	30,568
CWM: Invest - Other (7984)	1,933,798	2,283,303	Cost	2,526,850
Landa Financial Svc - Other	1,037,592	1,097,879	Cost	1,097,073
US Trust: Other (6420)	615,420	884,914	Cost	880,719
Total	\$ 3,586,810	\$ 4,673,174		\$ 4,911,720

**Statement 9 - Form 990-PF, Part II, Line 14 - Land, Building, and Equipment**

Description	Beginning Net Book	End Cost / Basis	End Accumulated Depreciation	Net FMV
Bldgs - 19055 35th Ave W	\$ 18,932	\$ 18,932	\$	\$ 1,000,000
Improvements - 19055 35th Ave W	491,190	491,190		
Expansion investigation / design	55,482	72,246		
Personal property	102,166	102,166		
Land - 19055 35th Ave W	20,000	20,000		750,000
Total	\$ 687,770	\$ 704,534	\$ 0	\$ 1,750,000

**Federal Statements**

**Statement 10 - Form 990-PF, Part II, Line 15 - Other Assets**

Description	Beginning of Year	End of Year	Fair Market Value
Form 941 overpayment Rndg	\$ 7,293	\$ -1	
Deposit - Federal Excise Tax	10,000	13,000	13,000
Total	<u>\$ 17,293</u>	<u>\$ 12,999</u>	<u>\$ 13,000</u>

**Statement 11 - Form 990-PF, Part II, Line 22 - Other Liabilities**

Description	Beginning of Year	End of Year
Form 941 payable Tax payable - SUTA Rndg	\$ 1,189	\$ -2
Total	<u>\$ 1,187</u>	<u>\$ 0</u>

**Form 990-PF, Part XV, Line 2b - Application Format and Required Contents**

Description

General information explaining worthy cause.

**Form 990-PF, Part XV, Line 2c - Submission Deadlines**

Description

None.

**Form 990-PF, Part XV, Line 2d - Award Restrictions or Limitations**

Description

None.

**Other Notes and Loans Receivable**

Form **990-PF**

**2014**

For calendar year 2014, or tax year beginning , and ending

Name

Employer Identification Number

**Joseph L Lewith Trust Estate**

**91-6061781**

**Form 990-PF, Part II, Line 7 - Additional Information**

Name of borrower	Relationship to disqualified person
(1) <b>A/R - other</b>	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	

Original amount borrowed	Date of loan	Maturity date	Repayment terms	Interest rate
(1)				
(2)				
(3)				
(4)				
(5)				
(6)				
(7)				
(8)				
(9)				
(10)				

Security provided by borrower	Purpose of loan
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
(10)	

Consideration furnished by lender	Balance due at beginning of year	Balance due at end of year	Fair market value
(1)	<b>3,300</b>		
(2)			
(3)			
(4)			
(5)			
(6)			
(7)			
(8)			
(9)			
(10)			
<b>Totals</b>	<b>3,300</b>		

Trust Estate – Joseph L. Lewith, Dec'd  
Form 990-PF  
CY 2014

91-6061781

**Form 990-PF, Part I, Line 13, Cols (b) & ©**

CWB	$1.5 * 50 * \$ 80$	=	6,000
RRB	$2.0 * 50 * \$ 150$	=	15,000

**Form 990-PF, Part I, Line 21:**

Meals & Entertainment	4,284	1,500	Estimated to be directly assoc with production of investment income.
Vehicle exp	<u>8,128</u>		
	<u>12,412</u>		

**Schedule Supporting Part X, Form 990-PF**  
**Trust Estate - Joseph L Lewith, Deceased 91-6061781**  
**CY 2014**

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18
	Acc #				150.25	150.00	151.00	151.25	180.00	170.00	180.00	185.00					
					Sweep	Sweep	Sweep	CWMop	Seattle 1st	Landa	UST-6420	UST-4339	Total				
					CWMin	CWMin	CWMin	CWMin	CWMin	CWMin	UST-6420	UST-4339	Total				
7	Cash, CD's, Sec:																
9	12/31/13		79,816		254,345	14,457	46,224	0	13,526	6,763	293,621	1,198	709,950				
11	01/31/14		86,349		86,656	2,405	45,703	22	13,872	6,763	73,083	643	285,496	709,950	285,496	502,723	
12	02/28/14		59,589		68,497	2,290	51,015	34	16,809	6,763	72,991	2,486	280,154	295,496	280,154	287,925	
13	03/31/14		60,467		126,894	12,009	109,243	619	17,618	12,231	73,218	5,026	417,325	280,154	417,325	348,740	
14	04/30/14		61,570		127,009	2,184	92,827	133	17,994	230	35,013	2,419	339,379	417,325	339,379	378,352	
15	05/31/14		12,295		96,485	2,184	4,842	121	21,150	230	34,560	4,254	176,141	339,379	176,141	257,760	
16	06/30/14		21,777		109,248	2,184	4,831	110	21,959	230	35,462	2,365	198,186	176,141	198,186	187,164	
17	07/31/14		-7,912		108,657	2,184	35,490	97	22,477	230	35,145	3,613	200,181	198,186	200,181	199,184	
18	08/31/14		4,642		796,715	3,402	31,752	134	25,491	230	34,737	2,051	899,154	200,181	899,154	549,668	
19	09/30/14		12,970		112,857	15,591	2,541	415	25,183	230	35,574	3,415	208,766	899,154	208,766	553,960	
20	10/31/14		11,769		131,708	6,062	30,744	-40	25,559	230	35,107	2,002	243,221	208,766	243,221	225,994	
21	11/30/14		17,204		140,872	5,701	30,229	22	28,462	230	24,073	1,505	248,298	243,221	248,298	245,760	
22	12/31/14		23,979		196,589	19,636	706	64	29,271	230	60,628	2,169	333,273	248,298	333,273	290,786	
23			344,779		2,102,387	75,822	439,923	1,811	265,846	27,827	549,232	31,948	3,839,574	4,216,251	3,839,574	4,027,913	
24													3,839,574				1/2
25	Avg Balance																335,659

**Schedule Supporting Part X, Form 990-PF**  
**Trust Estate - Joseph L. Lewith, Deceased 91-6061781**  
**CY 2014**

	1	2	3	4	5	6	7	8	8	10	11	12	13	14	15	16	17	18
33																		
34																		
35																		
36																		
37																		
38																		
39																		
40																		
41		12/31/13				3,495,707		49,536		1,254,775			102,065	4,902,083				
42		01/31/14				3,459,481		28,747		1,179,973			100,392	4,767,593	4,767,593	4,767,593	4,834,838	
43		02/28/14				3,433,449		305,782		1,247,700			102,218	5,089,149	4,767,593	5,089,149	4,928,371	
44		03/31/14				3,379,342		211,978		1,260,815			98,645	4,950,780	5,089,149	4,950,780	5,019,965	
45		04/30/14				3,378,328		192,341		1,305,175			101,645	4,977,489	4,950,780	4,977,489	4,964,135	
46		05/31/14				3,528,384		196,704		1,365,290			101,677	5,192,055	4,977,489	5,192,055	5,084,772	
47		06/30/14				3,603,705		178,924		1,369,429			106,011	5,258,069	5,192,055	5,258,069	5,225,062	
48		07/31/14				3,502,883		134,581		1,383,853			103,241	5,124,558	5,258,069	5,124,558	5,191,314	
49		08/31/14				2,979,610		110,317		1,471,424			108,475	4,567,826	5,124,558	4,567,826	4,646,192	
50		09/30/14				2,719,609		68,798		1,457,533			107,038	4,352,978	4,567,826	4,352,978	4,460,402	
51		10/31/14				2,802,464		40,056		1,550,542			105,990	4,499,052	4,352,978	4,499,052	4,425,015	
52		11/30/14				2,811,612		11,134		1,555,445			107,833	4,586,024	4,499,052	4,586,024	4,542,538	
53		12/31/14				2,728,022		0		1,605,222			103,435	4,436,679	4,586,024	4,436,679	4,511,352	
54						0		1,479,362		16,851,401		0	1,244,800	57,802,252	59,287,656	57,802,252	69,034,964	
55						38,228,888		0		0		0	0	57,802,252	57,802,252	57,802,252	69,034,964	
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# Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

Form **8868**

(Rev. January 2014)

Department of the Treasury  
Internal Revenue Service

▶ **File a separate application for each return.**  
▶ **Information about Form 8868 and its instructions is at [www.irs.gov/form8868](http://www.irs.gov/form8868).**

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I and check this box
- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II (on page 2 of this form)

**Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868**

**Electronic filing (e-file).** You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit [www.irs.gov/efile](http://www.irs.gov/efile) and click on e-file for Charities & Nonprofits

### Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed)

A corporation required to file Form 990-T and requesting an automatic 6-month extension – check this box and complete Part I only

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions. <b>Joseph L Lewith Trust Estate</b>	Employer identification number (EIN) or <b>91-6061781</b>
File by the due date for filing your return. See instructions	Number, street, and room or suite no. If a P.O. box, see instructions. <b>126 - 3rd Ave South 102</b>	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. <b>Edmonds WA 98020</b>	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720 (other than individual)	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**TR Tindall, CPA**  
**PO Box 968**

- The books are in the care of ▶ **Edmonds**

**WA 98020**Telephone No ▶ **425-774-7739**FAX No ▶ **425-771-9165**

- If the organization does not have an office or place of business in the United States, check this box
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box . If it is for part of the group, check this box  and attach

a list with the names and EINs of all members the extension is for

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until **08/15/15**, to file the exempt organization return for the organization named above. The extension is for the organization's return for
- ▶  calendar year **2014** or
- ▶  tax year beginning \_\_\_\_\_, and ending \_\_\_\_\_

- 2 If the tax year entered in line 1 is for less than 12 months, check reason  Initial return  Final return  Change in accounting period

3a If this application is for Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a	\$	4,537
b If this application is for Forms 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b	\$	13,000
c <b>Balance due.</b> Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	3c	\$	0

**Caution.** If you are going to make an electronic funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

For Privacy Act and Paperwork Reduction Act Notice, see instructions.  
DAA

Form **8868** (Rev. 1-2014)