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# Form **990-PF** Department of the Treasury

#### **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.

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

OMB No 1545-0052

For	calendar year 2015 or tax year beginning		, and ending		
	ne of foundation HIRLEY & MILTON LEVY FAMI	I.V		A Employer identification	number
	HARITABLE TRUST	<b></b>		22-6480716	
	nber and street (or P O box number if mail is not delivered to street a	address)	Room/suite	B Telephone number	
	.O. BOX 9175			(508)390-2	318
	y or town, state or province, country, and ZIP or foreign po RAMINGHAM, MA 01701	ostal code		C If exemption application is p	ending, check here
_	Check all that apply: Initial return	Initial return of a fo	rmer public charity	D 1. Foreign organizations	s, check here
	Final return	Amended return	The past of the state of		
	Address change	Name change		Foreign organizations me check here and attach co	eeting the 85% test, emputation
H C	Check type of organization: X Section 501(c)(3) exe			E If private foundation sta	
با		Other taxable private founda		under section 507(b)(1)	)(A), check here
	air market value of all assets at end of year J Accountin	-	Accrual	F If the foundation is in a	
•	rom Part II, col. (c), line 16) -\$ 5 , 519 , 588 . (Part I, colur	her (specify) mn (d) must be on cash l	pasis )	under section 507(b)(1	)(B), check here
	Analysis of Revenue and Expenses	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements
	(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) )	expenses per books	income	income	for charitable purposes (cash basis only)
	1 Contributions, gifts, grants, etc., received			N/A	
	2 Check If the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	65,850.	65,850.		STATEMENT 1
	4 Dividends and interest from securities 5a Gross rents	05,050.	03,030.		DIVIDUOM I
	b Net rental income or (loss)				
	68 Net gain or (loss) from sale of assets not on line 10	277,645.			
Revenue	b Gross sales price for all 277,709.			L. TOP.	- 1
eve	7 Capital gain net income (from Part IV, line 2)		277,645	I LULIK.	
<u> </u>	8 Net short-term capital gain			[2] 9 T 9	0
	9 Income modifications Gross sales less returns		-	91 MAR 0 7 20	1.5
2	10a and allowances			(L)	
_	b Less Cost of goods sold c Gross profit or (loss)			OGDEN.	1.1
4	11 Other income		. '	Section of the sectio	
f 	12 Total. Add lines 1 through 11	343,495.	343,495.		
-	13 Compensation of officers, directors, trustees, etc	0.	0.		0.
•	14 Other employee salaries and wages			ļ <u>.</u>	
۾ لِيَ	15 Pension plans, employee benefits				
NAME I	16a Legal fees   STMT 2	250.	250.		0.
Z X	c Other professional fees	230.	230.	-	<del>                                     </del>
${ m SC}_{ m P}$ Operating and Administrative Ex	17 Interest				
rati	18 Taxes STMT 3	2,179.	1,659.		0.
inist	19 Depreciation and depletion				
<u>i</u>	20 Occupancy				
ΥÞ	21 Travel, conferences, and meetings	· <del>-</del>			
gan	22 Printing and publications 23 Other expenses			<del> </del>	<del> </del>
ating	24 Total operating and administrative				
pers	expenses. Add lines 13 through 23	2,429.	1,909.		0.
ō	25 Contributions, gifts, grants paid	256,600.			256,600.
	26 Total expenses and disbursements.				256 622
	Add lines 24 and 25	259,029.	1,909.		256,600.
	27 Subtract line 26 from line 12:	84,466.			
	8 Excess of revenue over expenses and disbursements     b Net investment income (if negative, enter -0-)	04,400.	341,586.	<del></del>	
	C Adjusted net income (if negative, enter -0-)		311,300.	N/A	
5235				1/1	Farm 000 DE (0045

-	-	-						
C	н	AR	ТТ	ΊA	31.	E C	וזאיז	rei

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	Part II Balance Sheets Attached schedules and amounts in the description column should be for and an experienced.		Beginning of year		End of year			
<u>P</u>	aπ	column should be for end-of-year amounts only	(a) Book Value	(b) Book Value	(c) Fair Market Value			
	1	Cash - non-interest-bearing	25,627.	29,251.	29,251.			
	2	Savings and temporary cash investments			<u> </u>			
	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						
	7							
		Less; allowance for doubtful accounts						
ts	8	Inventories for sale or use						
Assets	9	Prepaid expenses and deferred charges						
⋖	l	Investments - U.S. and state government obligations	4 005	4 044	4 100 050			
	1	Investments - corporate stock STMT 4	1,875.	1,811.	4,106,256.			
	٥	Investments - corporate bonds			<del></del>			
	11	Investments - land, buildings, and equipment basis						
		Less accumulated depreciation		<u> </u>	<u> </u>			
	12	Investments - mortgage loans	1 004 057	1 175 063	1 204 001			
	13	Investments - other STMT 5	1,094,957.	1,175,863.	1,384,081.			
	14	Land, buildings, and equipment; basis						
	١	Less accumulated depreciation						
		Other assets (describe		<u>-</u>	<del></del>			
	16	Total assets (to be completed by all filers - see the	1,122,459.	1,206,925.	5,519,588.			
_	47	instructions. Also, see page 1, item I)	1,144,459.	1,200,323.	3,313,300.			
	l	Accounts payable and accrued expenses						
	18 19	Grants payable Deferred revenue						
Liabilities								
Ρij	20	Loans from officers, directors, trustees, and other disqualified persons  Mortgages and other notes payable						
Ë	22	Other liabilities (describe )						
		The mannes (5000) by						
	23	Total liabilities (add lines 17 through 22)	0.	0.				
_		Foundations that follow SFAS 117, check here						
		and complete lines 24 through 26 and lines 30 and 31.						
ances	24	Unrestricted						
au	25	Temporarily restricted						
Bal	26	Permanently restricted						
P		Foundations that do not follow SFAS 117, check here						
Ę		and complete lines 27 through 31.						
S	27	Capital stock, trust principal, or current funds	58,171.	<u>58,171.</u>				
Net Assets or Fund Ba	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.				
As	29	Retained earnings, accumulated income, endowment, or other funds	1,064,288.	1,148,754.				
Ž	30	Total net assets or fund balances	1,122,459.	1,206,925.				
	İ		1 100 450	1 206 225				
_	31	Total liabilities and net assets/fund balances	1,122,459.	1,206,925.				
P	art	III Analysis of Changes in Net Assets or Fund E	Balances					
1	Tota	I net assets or fund balances at beginning of year - Part II, column (a), line	30					
		st agree with end-of-year figure reported on prior year's return)		1	1,122,459.			
2	Ente	r amount from Part I, line 27a		2	84,466.			
3	Othe	r increases not included in line 2 (itemize)		3	0.			
		lines 1, 2, and 3	<del></del>	4	1,206,925.			
		eases not included in line 2 (itemize)		5	0.			
6	Tota	net assets or fund balances at end of year (line 4 minus line 5) - Part II, c	olumn (b), line 30	6	1,206,925.			
					Form <b>990-PF</b> (2015)			

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Part IV   Capital Gains a	ind Losses for Tax on Ir	nvestment	Income			_			
(a) List and descri 2-story brick war	(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.)						(c) Date a (mo., da		(d) Date sold (mo., day, yr.)
1a 3000 SHS TJX CO	S INC NEW	· -	_			P (	06/2	5/98	12/09/15
b CAPITAL GAINS I	DIVIDENDS		_						
С								_	
d								_	
е			<u> </u>	<u> </u>					
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale					ain or (loss (f) minus	
a 211,963.	· · ·		6	4.					211,899.
ь 65,746.			_						65,746.
С									
d									
е		ļ	<u> </u>						
Complete only for assets showing	g gain in column (h) and owned by	the foundation	on 12/31/69			(1)	Gains (C	ol. (h) gain	n minus
	(j) Adjusted basis	(k) Ex	cess of col. (ı)			col.		ot less tha (from col.	
(i) F.M.V. as of 12/31/69	as of 12/31/69	over	col. (j), if any				LUSSUS	(II OIII COL	('' <i>)</i> )
a									211,899.
b		1							65,746.
С		1							
d									<u> </u>
е			-						
	∫ If gain, also ente	r in Part I line	7	7					· · · · · · · · · · · · · · · · · · ·
2 Capital gain net income or (net cap					2	ļ			<u>277,645.</u>
3 Net short-term capital gain or (los	s) as defined in sections 1222(5) a	nd (6).							
If gain, also enter in Part I, line 8,		(0).		), l					
If (loss), enter -0- in Part I, line 8				J	3			N/A	<u> </u>
Part V Qualification U	nder Section 4940(e) for	r Reduced	Tax on Net	t Inv	estn	nent Inc	ome		
(For optional use by domestic private	foundations subject to the section	4940(a) tax on	net investment in	ncome	e.)				
	a contract								
If section 4940(d)(2) applies, leave th	іѕ рагт ріапк.								
Was the foundation liable for the sect	ion 4942 tax on the distributable ar	nount of any ye	ar in the base pe	riod?					Yes X No
If "Yes," the foundation does not quali	fy under section 4940(e). Do not c	omplete this pa	rL						
1 Enter the appropriate amount in e	ach column for each year; see the	instructions bef	fore making any e	entries	6.				
(a)	(b)			(c)	)			Dietri	(d) bution ratio
Base periód years Calendar year (or tax year beginnir	ng in) Adjusted qualifying di	stributions	Net value of no	oncha	rıtable	-use assets		(col. (b) di	vided by col. (c))
2014	24	13,175.		5	,19	5,623	•		.046804
2013	20	05,216.		4	,98	6,721	•		.041152
2012		59,012.		4	,11	8,371			.041039
2011		14,896.	-	3	,56	1,486	•		.040684
2010		28,035.				8,026			.041869
					-				
2 Total of line 1, column (d)							2		.211548
3 Average distribution ratio for the 5	s-vear hase period - divide the total	on line 2 hv 5	or by the number	r of ve	ears		<u> </u>		
the foundation has been in exister		oo 2 0, 0,	o, o,	, .			3		.042310
the foundation has been in exister	ice ii icas tiluii o yours						<u> </u>		
4 Enter the net value of noncharitab	la-uea assats for 2015 from Part Y	line 5					4		5,564,795.
4 Enter the net value of honoraritati	ie-use assets for 2013 from rait A	, iiiie J					<del>-</del>		5,001,,,,,
E. Multi-tulia - Abustina O							5		235,446.
5 Multiply line 4 by line 3							-		233/1101
	(40) ( 5 ) ( 1 ) ( 67)								3,416.
6 Enter 1% of net investment incom	ie (1% of Part I, line 27b)						6	_	3,410.
							_		238,862.
7 Add lines 5 and 6							7		430,004.
6 Follow and 17 Control of the 18 Control of the	Ded VII line 4						_		256,600.
8 Enter qualifying distributions from	•		1-1-11-1		0/ 3		8		230,000.
If line 8 is equal to or greater than See the Part VI instructions.	line 7, check the box in Part VI, lin	e 1b, and comp	nete that part usir	1g a 1	% tax	rate.			

Form **990-PF** (2015)

SHIRLEY & MILTON LEVY FAMILY

Part VI   Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)  1 bits or ruing or determination letter: 1 bits or ruing or determination letter: 2 bit or ruing or determination letter: 3 can be considered to the control of t	Form 990-PF (2015) CHARITABLE TRUST		22-6480			Page 4
Domestic Outdations that meet the section 4940(e) requirements in Part V, chack here ▶ ☑ and enter 1% of Part I, line 27b of Part I Part			1948 - see	instru	ictioi	ns)
b Domestic foundations that meet the section 4947(a) requirements in Part V, check here ► X and enter 1% of Part I, line 12? b  e 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 basable foundations only. Others enter -0-)  3 Add lines 1 and 2  4 Subtitit A (morner) bit (domestic section 4947(a)(1) trusts and basable foundations only. Others enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-  6 Crodish-Payments:  2 2015 estimated bit as pyraments. Add lines 3 bit should be subtracted to 2015  6 Each of the company organizations - tax withheld at source  1 Total credits and payments. Add lines 3 bit though 56  6 Beakup withholding erroneously withheld  7 Total credits and payments. Add lines 3 bit the 16 from 1868)  6 Ection 2 Total credits and payments. Add lines 3 bit the 16 from 1869.  6 Enter any penalty for underpayment of estimated tax. Check here 2 If Form 2220 is attached  9 Tax due. Ill the total inters 3 bit total or 16 bit interes 3 and 8, enter the amount owed  11 Enter the amount of line 17 to 19 bit interes 3 and 8, enter the amount owed  11 Enter the amount of line 17 to 19 bit interes 3 and 8, enter the amount owed  11 Enter the amount of line 17 to 19 bit interes 3 and 8, enter the amount owed  12 During the tax year, due the foundation attempt to millurence any national, state, or local elegislation or duit it participate or intervene may political campagn?  13 During the tax year, due the foundation and the year (either directly) for political purposes (see instructions for intervene due to the section of the activities and copy of the chan			1 1			
or Part I, line 27b  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-)  3 Ad lines 1 and 2  4 Subbta & Annome) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-  5 Crodisting-inpentity  a 2015 estimated tax payments and 2014 overpayment credeted to 2015  5 Evempt foreign organizations — tax withheld at source  1 Total crodists and payments. Add lines 6 to through 6d  2 Evempt foreign organizations — tax withheld at source  1 Total crodists and payments. Add lines 6 to through 6d  2 Total crodists and payments. Add lines 6s to through 6d  3 Total crodists and payments. Add lines 6s to through 6d  5 Total crodists and payments. Add lines 6s to through 6d  6 Enter any pealty for underpayment of estimated tax. Check hare X if Form 2220 is attached  5 Tax due. If the total of lines 5 and 6 is more than line 7, either amount over 6  6 Total crodists and payments. Add is more than line 7, either amount over 6  6 Total crodists and payments. Add is more than line 7, either amount over 6  6 Total crodists and payments. Add is so more than line 7, either amount over 9ial  1 Enter the amount of line 10 to be credited to 2015 be estimated tax. Provided a payment of lines 10 to be credited to 2015 be estimated tax. Provided Payment of 10 overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid  1 Darries the sayer, did the foundation attempt to influence any national, state, or local legislation or did it participals or inferview in any political campaign?  5 Did to spend more than \$100 dump the year (either directity or midrectly) for political explandations for midrection for form 119-0-0 to the year?  6 Enter the rembursement (if any) paid by the foundation midrection form and payment	Date of ruling or determination letter: (attach copy of letter if ned	cessary-see instructions)				
c At 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-)  3 Add lines 1 and 2  3 3, 4.16 -  4 Subtible A (income) bix (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  5 Tax based on investment income. Subtract line 4 from line 3, if zaro or less, enter -0-  6 Credits/Payments:  2 2015 estimated tax payments and 2014 overpayment credited to 2015  8 Exempt strengo organizations - tax withheld at source  6 Tax paid with application for extension of time to life (Form 8868)  8 Exempt strengo organizations - tax withheld at source  6 Tax paid with application for extension of time to life (Form 8868)  7 Total credits and payments. Add lines 6a through 6d  8 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed  9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed  9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed  10 Diverpayment. If line 7 is more than line 10 in the Credited to 2015 astimated tax ▶  11 Event the amount of line 10 in be. Credited to 2015 astimated tax ▶  12 Part VII-A. I Statement's Regardling Activities  13 Duming the tax year, did the foundation attempt to millence any national, state, or local ligislation or did it participate or intervene in any political campagin?  12 During the tax year, did the foundation attempt to millence any national, state, or local ligislation or did it participate or intervene in any political campagin?  15 During the tax year, did the foundation attempt to millence any national, state, or local ligislation or did it participate or intervene in any political campagin?  16 Extent the amount of line 10 in the year?  17 Extent the amount of any of tax on political expenditures (section 4955) imposed during the year.  19 Cyl. The any political campagin?  10 Extent the amount of any of	<b>b</b> Domestic foundations that meet the section 4940(e) requirements in Part V, check here	► X and enter 1%	1		3,4	<u> 16.</u>
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 2 3 3,416.  3 3,416.  4 Subtate A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3.1 (zano or ites, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3.1 (zano or ites, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3.1 (zano or ites, enter -0- 5 Tax dus with application for extension of time to file (Form 8868) 5 Everngt through organizations. From withheld at source 6 Tax gain with application for extension of time to file (Form 8868) 6 Extension through organizations. From the file of the form 8868) 7 Tax dus. If the full of lines 5 and 8 is more than line 7, either amount oved 8 Enter any penalty for underpayment of estimated tax. Check here	· · · · · · · · · · · · · · · · · · ·		1			
3 3, 4.16.  4 Subtile A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)  5 Tax hased on investment income. Subtract line 4 from line 3. if zero or less, enter -0-  6 Creditis/Payments:  a 2016 setimated tax payments and 2014 overpayment credited to 2015  b Evempt foreign organizations - tax withheld at source  1 Tax paid with application for extension of time to file (Form 8868)  6 Bed	c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4%	6 of Part I, line 12, col. (b). ノ	1			_
4 Subtate A (ancome) tax (domesto section 4947(a)(1) frusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3. if zero or less, enter -0- 6 Credits/Payments; a 2015 estimated tax payments and 2014 overpayment credited to 2015 b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to fite (Form 8668) d Backup withholding arroneously withheld 7 Total credits and payments. Add lines 63 through 64 8 Enter any penalty for underpayment of estimated tax. Check here [X] if Form 2220 is attached 8 Tax due. If the total clines 5 and 8 is more than line total of lines 5 and 8, enter the amount ower. 9 Tax due. If the total clines 5 and 8 is more than line total of lines 5 and 8, enter the amount ower. 10 Overpayment, If line 7 is more than the total of lines 5 and 8, enter the amount ower. 11 Enter the amount of line 1010 is. Creditefle to 2016 settimated tax.  12 During the tax year, do the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in 2 any political campaign?  10 Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the defination)?  11 During the tax year, do the foundation in connection with the activities 10 Did to foundation file Form 1120-POL for this year?  2 Did to the foundation file Form 1120-POL for this year?  2 Has the foundation engaged in any activities that have not previously been reported to the IRS?  11 Yes, 'attach a detailed description of the activities 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?  11 Yes, 'attach a detailed description of the activities 2 Has the foundation engaged in any activities that have not previously been reported to the IRS?  12 Yes, 'attach a detailed description of the activities 3 Has the foundation engaged in any activities that have not previously been reported to the IRS?  1	2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. O	thers enter -0-)	-		<u> </u>	
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0- 6 Credits/Payments: a 2015 estimated tax payments and 2014 overpayment credited to 2015 b Exempt foreign organizations - tax withheld at source c Tax park with application for extension of time to life (Form 8868) d Backup withholding groneously withheld 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here IX if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owerpaid 11 Enter the amount of line 10 to let; Credited to 2016 estimated tax ▶  Part VII-A   Statements Regarding Activities 11 During the tax year, did the foundation attempt to influence any handnal, state, or local legislation or did it participate or intervene in any political campagin? 12 During the tax year, did the foundation attempt to influence any handnal, state, or local legislation or did it participate or intervene in any political campagin? 13 During the tax year, did the foundation attempt to influence any handnal, state, or local legislation or did it participate or intervene in any political campagin? 14 Did the foundation his ferm 1120-POL for this year? 25 Did it spendition the Form 1120-POL for this year? 26 Enter the amount (if any) of tax on poblical expenditures (section 4955) imposed during the year. 27 Line the foundation in any of tax on poblical expenditures (section 4955) imposed during the year. 28 Enter the reinfluences of years and the state form year. 39 State be foundation and any political purposes (see instructions) Political p			3		3,4	<u> 10.</u>
6 Credits/Payments: a 2015 estimated tax payments and 2014 overpayment credited to 2015 b Exempt foreign organizations - tax withheld at source c Tax pand with application for extension of time to file (Form 8868) d Backup withholding erroneously withhold 7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here [X] if Form 2220 is attached 9 Tax die. If the total of lines 5 and 8 is more than time?, enter amount owed 9 Tax die. If the total of lines 5 and 8 is more than time?, enter amount owed 10 Overpayment. If line? Is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line (10 be; Creditefu 2016 estimated tax. Payment of the common of line (10 be; Creditefu 2016 estimated tax. Payment of the common of line (10 be; Creditefu 2016 estimated tax. Payment of the Common of t		Others enter -0-)	-		<del></del>	<u> </u>
a 2015 estimated but payments and 2014 overpayment credited to 2015  b Evempt foreign organizations - tax withheld at source  c Tax paid with application for extension of time to fite (Form 8868)  d Backup withholding erroneously withheld  7 Total credits and payments. Add lines 6a through 6d  8 Enter any penalty for underpayment of estimated tax. Check here ☑ if Form 2220 is attached  9 3, 496.  10 Overpayment. If line 7 is more than the total of lines 5 and 8, inter the amount owed  9 3, 496.  11 Enter the amount of line 10 to be; Credited to 2016 estimated tax.  Pent VII-A Statements Regarding Activities  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 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 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 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?  1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the definition)?  1f the answer is "Yes" to 1 a or 1b, attach a defailed description of the activities  c Did the foundation file Form 1120-POL for this year?  4 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:  (1) On the foundation magager in any activities that have not previously been reported to the IRS?  1f "Yes," attach a detailed description of the activities  1 Satisfies the foundation managers. Implication the power in the	5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-		5		3,4	<u> 10.</u>
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bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes  4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?  b if "Yes," has it filed a tax return on Form 990-T for this year?  Was there a liquidation, termination, dissolution, or substantial contraction during the year?  If "Yes," attach the statement required by General Instruction T  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?  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   8a Enter the states to which the foundation reports or with which it is registered (see instructions)  MA  b if the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation  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 2015 or the taxable year beginning in 2015 (see instructions for Part XIV)? If "Yes," complete Part XIV  9 X  10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	,					
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To bid any persona account substantial contributors during the day year. If Tes, attach a schedule listing the hardes and dedicates						
	To the any persons become substantial contributors during the tax year? If "Yes," attach a school	ule listing their names and addresses	F,		0-PF	

	rt VII-A Statements Regarding Activities (continued)			
_			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of	1 1		
	section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges?			
	If "Yes," attach statement (see instructions)	12		_X_
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ► N/A			
14	The books are in care of ▶ THE FELDBERG OFFICE Telephone no. ▶ (508)	390	<u>-23</u>	<u> 18</u>
	Located at ►P.O. BOX 9175, FRAMINGHAM, MA ZIP+4 ►0.	<u> 1701</u>		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here		<i>,</i> ▶	· []
	and enter the amount of tax-exempt interest received or accrued during the year		/A	
16	At any time during calendar year 2015, did the foundation have an interest in or a signature or other authority over a bank,		Yes	
	securities, or other financial account in a foreign country?	16		<u> </u>
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes," enter the name of the			
FD.	foreign country ► Int VII-B   Statements Regarding Activities for Which Form 4720 May Be Required			
Pa		1	Yes	No
4.	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.		163	110
18	in 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 X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)			
	a disqualified person?			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	1 1		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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)?			
	(6) Agree to pay money or property to a government official? (Exception. Check "No"	1 1		l
	if the foundation agreed to make a grant to or to employ the official for a period after	1 1		
	termination of government service, if terminating within 90 days.)	1		
ı	olf 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)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here			
(	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 2015?	10		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation			
	defined in section 4942(j)(3) or 4942(j)(5)):			
1	At the end of tax year 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning  before 2015?  Yes X No	1 1		
	If "Yes," list the years , , , , , , , , , , , , , , , , , , ,	1 1		
	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach			
	statement - see instructions.)	2b		
	: If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here.	<u></u>		
3:	a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
•	during the year? Yes X No			
ı	of "Yes," did it have excess business holdings in 2015 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 2015) N/A	3b		<u> </u>
4	a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		Х
	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 2015?	4b_		X
	F.	orm <b>990</b>	)-PF	(2015)

Form **990-PF** (2015)

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

#### SHIRLEY & MILTON LEVY FAMILY

Form 990-PF (2015) CHARITABLE TRUST		6480716 Page 7
Part VIII Information About Officers, Directors, Trustees, Foundat Paid Employees, and Contractors (continued)	ion Managers, Highly	
3 Five highest-paid independent contractors for professional services. If none, enter	"NONE."	
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
	1	
	_	
	4	
	<del>-</del>	
	-	
Total number of others receiving over \$50,000 for professional services		▶ 0
Part IX-A   Summary of Direct Charitable Activities	·	
List the foundation's four largest direct charitable activities during the tax year. Include relevant statisti	cal information such as the	
number of organizations and other beneficiaries served, conferences convened, research papers produ	uced, etc.	Expenses
1 N/A		
2		
3		
4		
4		
Part IX-B Summary of Program-Related Investments		·
Describe the two largest program-related investments made by the foundation during the tax year on I	ines 1 and 2.	Amount
1 N/A		-
2		
All other program-related investments. See instructions.		
Tetal Add lines 1 through 2		0.

Form **990-PF** (2015)

	mad 1 (cold) Charles I (cold)		3 2 3 3 1 4 3 5 1 4 3 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5 5
	Minimum Investment Return (All domestic foundations must complete this part. Foreig	n foundations, s	ee 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	5,606,275.
þ	Average of monthly cash balances	1b	43,263.
C	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	5,649,538.
е	Reduction claimed for blockage or other factors reported on lines 1a and		
	1c (attach detailed explanation)	0.	
2	Acquisition indebtedness applicable to line 1 assets	2 _	0.
3	Subtract line 2 from line 1d	3	5,649,538.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	84,743.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,564,795.
6	Minimum investment return. Enter 5% of line 5	6	278,240.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundation	ons and certain	
	foreign organizations check here 🕨 🔲 and do not complete this part.)		
1	Minimum investment return from Part X, line 6	1	278,240.
2a	Tax on investment income for 2015 from Part VI, line 5	16.	
b	Income tax for 2015. (This does not include the tax from Part VI.)		
C	Add lines 2a and 2b	2c	3,416.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	3,416. 274,824.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	274,824.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	274,824.
P	Qualifying Distributions (see instructions)		<del></del>
_			
١.	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes:	<sub>1a</sub>	256,600.
a	, ,	1b	230,000.
Þ		2	<u> </u>
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2   -	<del></del>
3	Amounts set aside for specific charitable projects that satisfy the:	اما	
	Suitability test (prior IRS approval required)	3a	<del></del> _
b	()	3b	256 600
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	256,600.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment	_	2 41 6
_	income. Enter 1% of Part I, line 27b	5	3,416. 253,184.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the found	ation qualifies for	the section
	4940(e) reduction of tax in those years		

Form **990-PF** (2015)

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI,				
line 7				274,824.
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only			256,381.	
<b>b</b> Total for prior years;		0.		
3 Excess distributions carryover, if any, to 2015:		0.		, <u>,</u>
a From 2010				
b From 2011				
c From 2012				
d From 2013				
e From 2014				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2015 from	0.	<del></del>		
Part XII, line 4: > \$ 256,600.				
a Applied to 2014, but not more than line 2a			256,381.	
<b>b</b> Applied to undistributed income of prior			230,301.	
years (Election required - see instructions)		0.		
c Treated as distributions out of corpus				,
(Election required - see instructions)	0.			
d Applied to 2015 distributable amount	•			219.
e Remaining amount distributed out of corpus	0.			217.
5 Excess distributions carryover applied to 2015	0.			0.
(If an amount appears in column (d), the same amount must be shown in column (a) )	0.			
6 Enter the net total of each column as indicated below:				
& Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
b Prior years' undistributed income. Subtract		_		
line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable				
amount - see instructions		0.		
e Undistributed income for 2014. Subtract line			•	
4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2015. Subtract				
lines 4d and 5 from line 1. This amount must				
be distributed in 2016				274,605.
7 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)	0.			
8 Excess distributions carryover from 2010	_			
not applied on line 5 or line 7	0.		<del>.</del> .	
9 Excess distributions carryover to 2016.	_			
Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2011				
b Excess from 2012				
c Excess from 2013				
d Excess from 2014				
e Excess from 2015	=			

SHIRLEY & MILTON LEVY FAMILY Form 990-PF (2015) CHARITABLE TRUST 22-6480716 Page 10 Part XIV | Private Operating Foundations (see instructions and Part VII-A, question 9) N/A • 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2015, enter the date of the ruling 4942(j)(3) or 4942(1)(5) b Check box to indicate whether the foundation is a private operating foundation described in section Prior 3 years Tax vear 2 a Enter the lesser of the adjusted net (a) 2015 (b) 2014 (c) 2013 (d) 2012 (e) Total 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 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 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 Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year-see instructions.) Information Regarding Foundation Managers: a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).) b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest. NONE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Check here 🕨 🔀 if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d. a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed: b The form in which applications should be submitted and information and materials they should include: c Any submission deadlines;

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

Part XV | Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, show any relationship to any foundation manager Foundation Purpose of grant or Amount status of contribution Name and address (home or business) or substantial contributor recipient a Paid during the year ACCORDED TAX EXEMPT STATUS UNDER 256,600. IRC SECTION 501 (C)(3). 501(C)3 CONTRIBUTIONS TO ALL RECIPIENTS WERE MADE TO FURTHER SEE ATTACHED THE ACTIVITIES AND PROGRAMS FOR WHICH THEY WERE 256,600. ▶ 3a Total **b** Approved for future payment NONE **▶** 3b Total

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Part XVI-A	Analysis	of Income	-Producing	<b>Activities</b>

Enter gross amounts unless otherwise indicated.	Unrelate	ed business income		ded by section 512, 513, or 514	(e)
<b>9</b>	(a) Business	(b)	(C) Exclu-	(d)	Related or exempt
1 Program service revenue:	code	Amount	sion code	Amount	function income
8					
b					
c					
d					
е					
f -					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash					
investments			14		
4 Dividends and interest from securities			14	65,850.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property	L				
b Not debt-financed property				_	
6 Net rental income or (loss) from personal			ļ		
property					
7 Other investment income			ļ		
8 Gain or (loss) from sales of assets other					
than inventory			18	277,645.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory			<u> </u>		
11 Other revenue:					
a					
b			<u> </u>		
c			ļ		_
d					
e			<u> </u>	242 425	
12 Subtotal. Add columns (b), (d), and (e)		0.	<u> </u>	343,495.	0.
13 Total. Add line 12, columns (b), (d), and (e)				13	343,495.
(See worksheet in line 13 instructions to verify calculations.)					
Part XVI-B Relationship of Activities to	o the Acc	omplishment of Ex	cemp	t Purposes	
Line No. Explain below how each activity for which incor	ma ia ranartad	un naturan (a) of Dort VI/I A	- nontril	autod importantly to the secon	anlichment of
the foundation's exempt purposes (other than the			Contin	Juleu importantly to the accor	ibiiziiiiieiif oi
the logitudation 3 exempt purposes (other than t	by providing to	mas for sach purposes).			
			-		
-		<del></del>			
		<del></del>			
		<del> </del>		<del></del>	
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					·· <del>·</del>

523621 11-24-15

		TABLE TRU		Y FAMILY		22_6	480716	Dogo 19
Form 990-PI				nd Transactions	and Polations			Page 13
FaitAV	Exempt Organ		SICIS IU a	ilu ITalisactions (	allu nelations	mps with None	Cilaillabic	
1 Did the	e organization directly or indi		of the following	with any other organizati	on described in sect	on 501(c) of		es No
	de (other than section 501(c						F	<del></del>
					iizations :		1 1	
	ers from the reporting found	iation to a noncharita	ible exempt org	anization of.			10(1)	x
(1) Ca							1a(1) 1a(2)	$\frac{x}{x}$
• •	ther assets						18(2)	<del>-   ^</del>
	transactions:						1,,,,	v
٠,	ales of assets to a noncharita	, ,					1b(1)	X
	urchases of assets from a no	· ·	organization				1b(2)	
• •	ental of facilities, equipment,						1b(3)	X
	eimbursement arrangements	3					1b(4)	X
	oans or loan guarantees						1b(5)	X
	erformance of services or mi	•	-				1b(6)	X
	g of facilities, equipment, ma						1c	
	answer to any of the above is	·	-					is,
	vices given by the reporting t			d less than fair market val	ue in any transactioi	n or sharing arrangem	ent, show in	
	n (d) the value of the goods,							
(a)Line no	(b) Amount involved	(c) Name o		exempt organization	(0) Descriptio	n of transfers, transactions	s, and sharing arra	ngements
			N/A	·				
						<u> </u>		
							· · · · · · · · · · · · · · · · · · ·	
				ï'				
2a Is the	foundation directly or indired	ctly affiliated with, or	related to, one	or more tax-exempt organ	izations described			
ın sect	tion 501(c) of the Code (othe	er than section 501(c	:)(3)) or in secti	on 527 <b>?</b>			Yes	X No
b If "Yes	," complete the following sch	nedule.						
	(a) Name of or	ganization		(b) Type of organization		(c) Description of rela	itionship	
	N/A	· <u>-</u>			, i			
	· · · · · · · · · · · · · · · · · · ·							
						<del></del>		
	nder penalties of perjury, I declare						May the IHS di	scuss this
Sign ar	nd belief, it is true, prect, and co	omplete Seclaration of p	reparer (other thar	n taxpayer) is based on all infor	mation of which prepare	er has any knowledge	return with the shown below (s	preparer
Here				19/20/16	Tousa	66	X Yes	☐ No
1	Signature of officer or truste	e		Date	Title		·	
	Print/Type preparer's n	ame	Preparer's si	gnature ,	Date	Check if F	PTIN	
						self- employed		
Paid	DEBRA JD N	<b>MALONE</b>		1/4-	02/18/16		P012789	14
Prepare				-		Firm's EIN ▶ 26		
		_				ī		

Form **990-PF** (2015)

Phone no. 617-761-0600

**Use Only** 

Firm's address ▶ 500 BOYLSTON STREET

BOSTON, MA 02116

SHIRLEY & MILTON LEVY FAMILY CHARITABLE - CONTRIBUTIONS					
EIN: 22-6480716					
	2015				
AMERICAN FRIENDS OF ISRAEL PHILHARMONIC ORCHESTRA	1,000.00				
AMERICAN FRIENDS OF HEBREW UNIVERSITY-Scholarship	1,000.00				
AMERICAN CIVIL LIBERTIES UNION	1,000.00				
AMERICAN JEWISH COMMITTEE - In honor of Steven Levy	5,000.00				
AMERICAN FRIENDS OF MAGAN DAVID ADOM	3,000.00				
BENJAMIN M BANKS MD FELLOWSHIP IN GASTROENTEROLOGY	20,000.00				
B'NAI B'RITH - ANTI DEFAMATION LEAGUE	3,000.00				
BRANDEIS UNIVERSITY	5,000.00				
DANA FARBER CANCER INSTITUTE	1,000.00				
FACING HISTORY AND OURSELVES-in honor of the work of Jared	15,000.00				
HADASSAH ANGEL OF MERCY	2,000.00				
HARVARD COLLEGE FUND-MEMORIAL GIFT	2,000.00				
HEBREW SENIORLIFE (formerly Rehab)	25,000.00				
HOSPICE FOUNDATION OF PALM BEACH COUNTY	5,000.00				
JEWISH FEDERATION OF PALM BEACH	75,100.00				
JEWISH FAMILY & CHILDRENS SERVICES-IN HONOR OF John Levy	7,000.00				
JFCS OF COLLIER COUNTY	5,000.00				
JEWISH NATIONAL FUND	1,000.00				
KRAVIS CENTER	10,000 00				
MIAMI CITY BALLET	2,000.00				
MORSE GERIATRIC CENTER	1,000.00				
MUSEUM OF FINE ARTS-BOSTON	7,500.00				
NEW CENTER OF ART AND CULTURE	2,000.00				
NEWTON WELLESLEY HOSPITAL	3,000.00				
NORTON MUSEUM OF ART	1,000.00				
PALM BEACH COMMUNITY CHEST	2,000.00				
PALM BEACH DRAMA WORKS	1,000.00				
PALM BEACH OPERA	3,000.00				
PHI BETA KAPPA-1606 New hampshire Dr., NW, Washington DC 20009	2,000.00				
SIMMONS COLLEGE - SCHOOL OF SOCIAL WORK	2,000.00				
SMITH COLLEGE ALUMNAE FUND	12,000.00				
SOCIETY OF THE FOUR ARTS	5,000.00				
TECHNION	2,000.00				
UNITED WAY OF PALM BEACH COUNTY	3,000.00				
US HOLOCAUST MEMORIAL MUSEUM	10,000.00				
WASHINGTON INSTITUTE FOR NEAR EAST STUDY	10,000.00				
WORLD JEWISH CONGRESS	1,000.00				
	, , , , ,				
	256,600.00				
GRAND TOTAL	,				
COURT COME					

FORM 990-PF	DIVIDENDS	AND INTER	EST FROM	SECURI	TIES	S	TATEME	NT :
SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDEND	REVE	NUE :	NET I	B) NVEST- INCOME	- ADJ	C) USTED INCOMI
QUANTITATIVE FUNDS TJX DIV	82,565. 49,031.			,819. ,031.		6,819. 9,031.		
TO PART I, LINE 4 =	131,596.	65,74	6. 65	,850.	6	5,850.		<del>-</del>
FORM 990-PF		ACCOUNTI	NG FEES			S	STATEME	NT 2
DESCRIPTION		(A) EXPENSES PER BOOKS	(B) NET INVE MENT INC			) STED NCOME	CHAR	D) .ITABLI .POSES
<del></del>		250.		250.			<u>.</u>	0
CBIZ TOFIAS								
	L, LN 16B	250.		250.			-	0
	L, LN 16B ==	250. TAX		250.		S	STATEME	
TO FORM 990-PF, PG 1	L, LN 16B			ST-			( CHAR	
TO FORM 990-PF, PG 1	L, LN 16B	TAX (A) EXPENSES	ES (B) NET INVE MENT INC	ST-	ADJU	) STED	( CHAR	D)
TO FORM 990-PF, PG 1 FORM 990-PF  DESCRIPTION US TREASURY		TAX (A) EXPENSES PER BOOKS 520.	ES (B) NET INVE MENT INC	ST-OME	ADJU	) STED	( CHAR	D) ITABLI POSES
TO FORM 990-PF, PG 1  FORM 990-PF  DESCRIPTION  US TREASURY FOREIGN TAX		TAX (A) EXPENSES PER BOOKS 520. 1,659.	ES  (B)  NET INVE  MENT INC  1,	ST- OME 0. 659.	ADJU	) STED NCOME	( CHAR	D) ITABLI POSES 0 0
TO FORM 990-PF, PG 1  FORM 990-PF  DESCRIPTION  US TREASURY FOREIGN TAX  TO FORM 990-PF, PG 1		TAX  (A)  EXPENSES PER BOOKS  520. 1,659. 2,179.	ES  (B)  NET INVE  MENT INC  1,	ST- OME 0. 659.	ADJU	STED NCOME	CHAR PUR	D) ITABLI POSES 0 0
TO FORM 990-PF, PG 1  FORM 990-PF  DESCRIPTION  US TREASURY FOREIGN TAX  TO FORM 990-PF, PG 1  FORM 990-PF		TAX  (A)  EXPENSES PER BOOKS  520. 1,659. 2,179.	ES  (B)  NET INVE  MENT INC  1,	ST- OME 0. 659.	ADJU NET I	STED NCOME	CHAR PUR STATEME	D) ITABLI POSES 0 0

### SHIRLEY & MILTON LEVY FAMILY CHARITABLE

FORM 990-PF	OTHER INVESTMENTS		STATEMENT	5
DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE	
QUANTITATIVE INC. INVESTMENTS	COST	1,175,863.	1,384,081	<u> </u>
TOTAL TO FORM 990-PF, PART II,	LINE 13	1,175,863.	1,384,081	<u>.</u>