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Form 990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2015

Open to Public Inspection

For calendar year 2015, or tax year beginning 01-01-2015, and ending 12-31-2015

Name of foundation HYMAN JEBB LEVY FOUNDATION		A Employer identification number 23-7422872	
Number and street (or P O box number if mail is not delivered to street address) 6634 VALJEAN AVE		B Telephone number (see instructions) (818) 781-4552	
City or town, state or province, country, and ZIP or foreign postal code VAN NUYS, CA 91406		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address 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"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input checked="" type="checkbox"/> \$ 7,214,136	J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (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))		Revenue and expenses per books (a)	Net investment income (b)	Adjusted net income (c)	Disbursements for charitable purposes (d) (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	2,433,173			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	34,117	34,117	34,117	
	4 Dividends and interest from securities	110,316	110,316	110,316	
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	160,688			
	b Gross sales price for all assets on line 6a 3,305,077				
	7 Capital gain net income (from Part IV, line 2) . . .		160,688		
	8 Net short-term capital gain			56,404	
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	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	2,738,294	305,121	200,837	
	13 Compensation of officers, directors, trustees, etc				
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).	5,795	5,795		
	c Other professional fees (attach schedule)	18,986	18,986		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) . . .	4,034	649		
	19 Depreciation (attach schedule) and depletion . .				
	20 Occupancy				
	21 Travel, conferences, and meetings.				
	22 Printing and publications				
	23 Other expenses (attach schedule).	20			
	24 Total operating and administrative expenses. Add lines 13 through 23	28,835	25,430		0
	25 Contributions, gifts, grants paid	235,300			235,300
	26 Total expenses and disbursements.Add lines 24 and 25	264,135	25,430		235,300
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	2,474,159			
	b Net investment income (if negative, enter -0-)		279,691		
	c Adjusted net income(if negative, enter -0-) . . .			200,837	

Part II		Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing				
	2	Savings and temporary cash investments	994,605	3,021,559	3,021,559	
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____				
	5	Grants receivable				
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions).				
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____				
	8	Inventories for sale or use				
	9	Prepaid expenses and deferred charges				
	10a	Investments—U S and state government obligations (attach schedule)	100,000	<input checked="" type="checkbox"/> 100,000	139,537	
	b	Investments—corporate stock (attach schedule)	2,095,835	<input checked="" type="checkbox"/> 2,883,145	3,379,297	
	c	Investments—corporate bonds (attach schedule)	932,270	<input checked="" type="checkbox"/> 592,165	510,643	
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
	12	Investments—mortgage loans.				
	13	Investments—other (attach schedule)				
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____				
15	Other assets (describe ▶ _____)	<input checked="" type="checkbox"/> 163,102	<input checked="" type="checkbox"/> 163,102	<input checked="" type="checkbox"/> 163,100		
16	Total assets(to be completed by all filers—see the instructions Also, see page 1, item I)	4,285,812	6,759,971	7,214,136		
Liabilities	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, and other disqualified persons	75,000	75,000		
	21	Mortgages and other notes payable (attach schedule).				
	22	Other liabilities (describe ▶ _____)				
	23	Total liabilities(add lines 17 through 22)	75,000	75,000		
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds	4,210,812	6,684,971		
	28	Paid-in or capital surplus, or land, bldg , and equipment fund				
	29	Retained earnings, accumulated income, endowment, or other funds				
	30	Total net assets or fund balances(see instructions)	4,210,812	6,684,971		
31	Total liabilities and net assets/fund balances(see instructions)	4,285,812	6,759,971			

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		4,210,812	
2	Enter amount from Part I, line 27a	2		2,474,159	
3	Other increases not included in line 2 (itemize) ▶ _____	3			
4	Add lines 1, 2, and 3	4		6,684,971	
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		6,684,971	

Part IV

Capital Gains and Losses for Tax on Investment Income

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

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	160,688
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 }		3	56,404

Part V

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

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)
If section 4940(d)(2) applies, leave this part blank

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2014	368,437	4,870,062	0 07565
2013	419,838	4,881,403	0 08601
2012	225,675	4,852,327	0 04651
2011	419,674	4,921,738	0 08527
2010	326,468	4,756,570	0 06864

2	Total of line 1, column (d).	2	0 362074
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 072415
4	Enter the net value of noncharitable-use assets for 2015 from Part X, line 5.	4	5,731,944
5	Multiply line 4 by line 3.	5	415,079
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	2,797
7	Add lines 5 and 6.	7	417,876
8	Enter qualifying distributions from Part XII, line 4.	8	235,300

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

Part VI

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

1a

Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1
Date of ruling or determination letter _____
(attach copy of letter if necessary—see instructions)

b

Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b

c

All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)

2

Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

3

Add lines 1 and 2.

4

Subtitle 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. If zero or less, enter -0-

6

Credits/Payments

a

2015 estimated tax payments and 2014 overpayment credited to 2015

6a

2,576

b

Exempt foreign organizations—tax withheld at source

6b

c

Tax paid with application for extension of time to file (Form 8868).

6c

d

Backup withholding erroneously withheld

6d

7

Total credits and payments. Add lines 6a through 6d.

8

Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.

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 overpaid**.

11

Enter the amount of line 10 to be **Credited to 2015 estimated tax** ☐ **Refunded** ☐

1	5,594
2	
3	5,594
4	
5	5,594
6a	2,576
6b	
6c	
6d	
7	2,576
8	
9	3,018
10	
11	

Part 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?

b

Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for 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.

c

Did the foundation file **Form 1120-POL** for this year?

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation ☐ \$ _____ (2) On foundation managers ☐ \$ _____

e

Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ _____

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?
If "Yes," attach a detailed description of the activities.

3

Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If "Yes," attach a conformed copy of the changes*

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?

5

Was there a liquidation, termination, dissolution, or substantial contraction during the year?
If "Yes," attach the statement required by General Instruction T.

6

Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either:
• By language in the governing instrument, or
• By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?

7

Did the foundation have at least \$5,000 in assets at any time during the year? *If "Yes," complete Part II, col. (c), and Part XV.*

8a

Enter the states to which the foundation reports or with which it is registered (see instructions):
☐ CA _____

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

10

Did any persons become substantial contributors during the tax year? *If "Yes," attach a schedule listing their names and addresses.*

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶N/A	13	Yes	
14	The books are in care of ▶HYMAN JEBB LEVY Telephone no ▶(818) 781-4552 Located at ▶6634 VALJEAN AVE VAN NUYS CA ZIP+4 ▶91406			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2015, 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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR) If "Yes", enter the name of the foreign country ▶	16	Yes	No

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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did 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)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		No
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 2015? <input type="checkbox"/>	1c		No
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 2015, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2015? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is 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). <input type="checkbox"/>	2b		No
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 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015.</i>) <input type="checkbox"/>	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2015?	4b		No

Part VIII

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

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

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

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

Part IX-A

Summary of Direct Charitable Activities

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

	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see instructions)

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

Part X

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	3,926,083
b	Average of monthly cash balances.	1b	1,730,049
c	Fair market value of all other assets (see instructions).	1c	163,100
d	Total (add lines 1a, b, and c).	1d	5,819,232
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	0
2	Acquisition indebtedness applicable to line 1 assets.	2	
3	Subtract line 2 from line 1d.	3	5,819,232
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	87,288
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	5,731,944
6	Minimum investment return. Enter 5% of line 5.	6	286,597

Part XI

Distributable Amount
(see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☒ and do not complete this part.)

1	Minimum investment return from Part X, line 6.	1	286,597
2a	Tax on investment income for 2015 from Part VI, line 5.	2a	5,594
b	Income tax for 2015 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	5,594
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	281,003
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	281,003
6	Deduction from distributable amount (see instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	281,003

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	235,300
b	Program-related investments—total from Part IX-B.	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	235,300
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	235,300

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 2014	(c) 2014	(d) 2015
1 Distributable amount for 2015 from Part XI, line 7				281,003
2 Undistributed income, if any, as of the end of 2015				
a Enter amount for 2014 only.				
b Total for prior years 20__, 20__, 20__				
3 Excess distributions carryover, if any, to 2015				
a From 2010.	94,373			
b From 2011.	176,299			
c From 2012.				
d From 2013.	179,292			
e From 2014.	130,080			
f Total of lines 3a through e.	580,044			
4 Qualifying distributions for 2015 from Part XII, line 4 \$ 235,300				
a Applied to 2014, but not more than line 2a				
b Applied to undistributed income of prior years (Election required—see instructions).				
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2015 distributable amount.				235,300
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2015 (If an amount appears in column (d), the same amount must be shown in column (a).)	45,703			45,703
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	534,341			
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see instructions.				
e Undistributed income for 2014 Subtract line 4a from line 2a Taxable amount—see instructions.				
f Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015.				0
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).				
8 Excess distributions carryover from 2010 not applied on line 5 or line 7 (see instructions).	48,670			
9 Excess distributions carryover to 2016. Subtract lines 7 and 8 from line 6a.	485,671			
10 Analysis of line 9				
a Excess from 2011.	176,299			
b Excess from 2012.				
c Excess from 2013.	179,292			
d Excess from 2014.	130,080			
e Excess from 2015.				

Part XIV

1a 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. . . . ▶

b Check box to indicate whether the organization is a private operating foundation described in section 170(c)(2)(B)(i) or 170(c)(2)(B)(ii): ☐ 170(c)(2)(B)(i) or ☐ 170(c)(2)(B)(ii)

		Prior 3 years				(e) Total
		(a) 2015	(b) 2014	(c) 2013	(d) 2012	
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

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

1 Information Regarding Foundation Managers:

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

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

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

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

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

Hyman Levy
6634 Valjean Ave
Van Nuys, CA 91406
(818) 781-4552

b The form in which applications should be submitted and information and materials they should include
No specific form background information & brochure on applicant

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	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	235,300
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated

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

[illegible]

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

	Yes	No
1a(1)		No
1a(2)		No
1b(1)		No
1b(2)		No
1b(3)		No
1b(4)		No
1b(5)		No
1b(6)		No
1c		No

[illegible]

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

b If "Yes," complete the following schedule

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

**Sign
Here**

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

* * * * *

2016-08-11

* * * * *

Signature of officer or trustee

Date

Title

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

☒ Yes ☐ No

**Paid
Preparer
Use
Only**

Print/Type preparer's name L LARRY CLUMECK	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN P01371460
Firm's name <input type="checkbox"/> Clumeck Stern Schenkelberg & Getzoff			Firm's EIN <input type="checkbox"/>	
Firm's address <input type="checkbox"/> 17404 Ventura Bl 2nd Floor Encino, CA 91316			Phone no (818) 906-2230	

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

List and describe the kind(s) of property sold (e g , real estate, (a) 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)
100000 GOLDMAN SACHS GROUP	P	2011-11-14	2015-12-03
4000 DOUBLELINE OPPORTUNISTIC CR FD	P	2012-12-31	2015-12-03
5000 NUVEEN CREDIT STRATEGY INCOME FUND	P	2012-02-15	2015-12-03
327 LIKENDIN CORP	P	2015-03-23	2015-05-01
2813 SPECTOR SPDR INDL SELECT	P	2014-11-18	2015-07-07
216 STARBUCKS CORP	P	2015-01-23	2015-07-28
982 ISHARES RUSSELL 1000 VALUE	P	2012-12-18	2015-07-21
704 STARBUCKS CORP	P	2015-05-29	2015-07-28
441 WABTEC	P	2015-02-19	2015-08-07
94 AMAZON COM	P	2015-07-13	2015-08-21

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

(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)
100,000		100,000	
99,638		100,000	-362
38,899		45,203	-6,304
65,458		84,090	-18,632
151,527		159,516	-7,989
12,337		9,476	2,861
101,530		72,742	28,788
40,208		36,495	3,713
42,889		41,711	1,178
47,271		42,867	4,404

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-362
			-6,304
			-18,632
			-7,989
			2,861
			28,788
			3,713
			1,178
			4,404

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	Date acquired (c) (mo , day, yr)	(d) Date sold (mo , day, yr)
36 AMAZON COM	P	2015-07-13	2015-08-21
478 FACEBOOK INC	P	2015-07-13	2015-08-21
183 FACEBOOK INC	P	2015-07-13	2015-08-21
980 ISHARES COR S&P 500	P	2014-11-05	2015-08-21
552 UNDER ARMOUR INC	P	2015-01-29	2015-08-21
172 VALEANT PHARMA INTL	P	2014-12-05	2015-08-21
270 ACUITY BRANDS INC	P	2015-01-23	2015-03-24
1516 LOWES CO	P	2014-09-04	2015-08-24
392 MIDDLEBY CORP	P	2015-02-20	2015-08-24
1624 STARBUCKS CORP	P	2015-01-23	2015-08-24

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

(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)
18,104		16,418	1,686
42,087		43,016	-929
16,113		16,469	-356
195,422		199,080	-3,658
50,420		40,249	10,171
38,398		25,020	13,378
51,144		41,176	9,968
103,895		81,107	22,788
41,327		42,651	-1,324
82,958		71,243	11,715

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			1,686
			-929
			-356
			-3,658
			10,171
			13,378
			9,968
			22,788
			-1,324
			11,715

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

List and describe the kind(s) of property sold (e g , real estate, (a) 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)
302 ISHARES NASDAQ BIOTECH INDEX FUND	P	2012-02-13	2015-08-08
170 SPDR A&P MIDCAP 400	P	2013-01-02	2015-08-07
211 SPDR A&P MIDCAP 400	P	2015-05-29	2015-08-07
169 WABTEC	P	2015-05-29	2015-08-07
375 ISHARES COR S&P 500	P	2015-05-29	2015-08-21
134 ISHARES NASDAQ BIOTECH INDEX FUND	P	2012-02-13	2015-08-21
169 ISHARES NASDAQ BIOTECH INDEX FUND	P	2015-05-29	2015-08-21
380 JAZZ PHARMACEUTICAL	P	2014-07-02	2015-08-21
146 JAZZ PHARMACEUTICAL	P	2015-05-29	2015-08-21
374 SPDR A&P MIDCAP 400	P	2012-09-19	2015-08-21

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

(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)
112,111		77,730	34,381
45,965		32,106	13,859
57,050		58,705	-1,655
16,436		16,898	-462
74,779		79,896	-5,117
45,801		16,076	29,725
57,764		20,275	37,489
64,822		61,603	3,219
24,905		26,175	-1,270
98,032		69,154	28,878

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			34,381
			13,859
			-1,655
			-462
			-5,117
			29,725
			37,489
			3,219
			-1,270
			28,878

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

List and describe the kind(s) of property sold (e g , real estate, (a) 2-story brick warehouse, or common stock, 200 shs MLC Co)	How acquired P—Purchase (b) D—Donation	Date acquired (c) (mo , day, yr)	(d) Date sold (mo , day, yr)
8 SPDR A&P MIDCAP 400	P	2013-01-02	2015-08-21
211 UNDER ARMOUR INC	P	2015-05-29	2015-08-21
213 VALEANT PHARMA INTL	P	2015-05-26	2015-08-21
103 ACUITY BRANDS INC	P	2015-05-29	2015-03-24
580 LOWES CO	P	2015-05-29	2015-08-24
150 MIDDLEBY CORP	P	2015-05-29	2015-08-24
692 SPDR S&P 500 EFT	P	2012-09-06	2015-08-24
265 SPDR S&P 500 EFT	P	2015-05-29	2015-08-24
2870 SPECTOR SPDR FINCL SELECT	P	2013-01-17	2015-08-25
1098 SPECTOR SPDR FINCL SELECT	P	2015-05-29	2015-08-25

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

(e) Gross sales price	Depreciation allowed (f) (or allowable)	Cost or other basis (g) plus expense of sale	Gain or (loss) (h) (e) plus (f) minus (g)
2,097		1,511	586
19,273		16,532	2,741
47,551		50,928	-3,377
19,510		18,330	1,180
39,749		40,748	-999
15,814		16,462	-648
133,692		99,420	34,272
51,197		56,080	-4,883
65,757		49,248	16,509
25,157		27,100	-1,943

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			Gains (Col (h) gain minus col (k), but not less than -0-) or (l) Losses (from col (h))
(i) F M V as of 12/31/69	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			586
			2,741
			-3,377
			1,180
			-999
			-648
			34,272
			-4,883
			16,509
			-1,943

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

List and describe the kind(s) of property sold (e g , real estate, (a) 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)
327 ISHARES TR RUSSELL 1000 GROWTH	P	2014-12-12	2015-08-27
610 ISHARES S&P 500 GROWTH	P	2014-12-04	2015-09-08
385 VALEANT PHARMA INTL	P	2014-12-05	2015-09-08
405 ISHARES TR RUSSELL 1000 GROWTH	P	2015-05-29	2015-08-27
755 ISHARES S&P 500 GROWTH	P	2015-05-29	2015-09-08
465 ISHARES S&P 500 GROWTH	P	2014-12-04	2015-09-28
218 ISHARES S&P 500 GROWTH	P	2015-01-06	2015-09-28
683 ISHARES S&P 500 GROWTH	P	2015-01-06	2015-12-21
6594 TECHNOLOGY SELECT SEDTOR	P	2015-10-28	2015-12-21
733 ISHARES TRUST S&P	P	2014-12-12	2015-12-21

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

(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)
31,210		30,904	306
67,103		68,970	-1,867
88,595		56,004	32,591
38,654		40,964	-2,310
83,054		88,229	-5,175
49,242		52,576	-3,334
23,085		24,562	-1,477
78,493		76,953	1,540
279,539		289,536	-9,997
72,337		69,273	3,064

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			306
			-1,867
			32,591
			-2,310
			-5,175
			-3,334
			-1,477
			1,540
			-9,997
			3,064

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

List and describe the kind(s) of property sold (e g , real estate, (a) 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)
200 KCAP FINL INC	P	2011-01-11	2015-01-14
300 KCAP FINL INC	P	2011-01-11	2015-01-14
500 ATLAS PIPELINE	P	2014-07-31	2015-03-03
640 KINDER MORGAN	P	2011-02-23	2015-12-14
3500 772 SANDRIDGE MISSISSIPPIAN	P	2012-09-20	2015-12-14
100 MONSANTO CO NEW	P	2013-11-27	2015-12-14
155 244 DEERE & CO	P	2014-03-27	2015-12-14
500 697 KCAP FINL INC	P	2014-05-08	2015-12-14
500 PLAINS ALL AMERICAN PIPELINE	P	2014-05-08	2015-12-14
500 XURA INC	P	2014-06-20	2015-12-14

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

(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)
1,317		1,375	-58
1,975		2,062	-87
630			630
177		1,459	-1,282
8,507		47,820	-39,313
9,356		11,392	-2,036
12,218		14,006	-1,788
1,931		4,000	-2,069
9,493		28,873	-19,380
12,979		13,320	-341

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-58
			-87
			630
			-1,282
			-39,313
			-2,036
			-1,788
			-2,069
			-19,380
			-341

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

List and describe the kind(s) of property sold (e g , real estate, (a) 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)
500 SEADRILL LTD	P	2014-08-01	2015-12-14
500 TARGA RESOURCES	P	2015-03-15	2015-12-14
5000 PIERIS PHARMACEUTICALS	P	2015-09-14	2015-12-14
1000 TRAVELZOO INC	P	2015-09-23	2015-12-14
1000 CIRRUS LOGIC	P	2015-12-03	2015-12-14
425 DICKS SPORTING GOODS	P	2015-12-03	2015-12-14

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

(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)
1,982		17,959	-15,977
7,996		24,081	-16,085
12,309		12,009	300
7,574		8,509	-935
32,645		33,159	-514
15,589		22,888	-7,299

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

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			-15,977
			-16,085
			300
			-935
			-514
			-7,299

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
BETH MIDRASH MISHKAN ISRAEL PO BOX 5351 NO HOLLYWOOD,CA 91616	NONE	PUBLIC	GENERAL	2,600
AMERICAN FRIENDS OF ISRAEL ELWYN PO BOX 828284 PHILADELPHIA,PA 19182	NONE	PUBLIC	GENERAL	4,000
GIMMEL FOUNDATION 10 WEST 86TH ST NEW YORK,NY 10024	NONE	PUBLIC	GENERAL	10,000
ADAT YESHURUN CONGRAGATION 12405 SYLVAN STREET NORTH HOLLYWOOD,CA 91606	NONE	PUBLIC	GENERAL	3,600
ISRAEL SPECIAL KIDS FUND 505 8TH AVENUE NEW YORK,NY 10018	NONE	PUBLIC	GENERAL	7,500
AISH LOS ANGELES 1417 SOUTH DOHENY DRIVE LOS ANGELES,CA 90035	NONE	PUBLIC	GENERAL	1,800
LOS ANGELES GROUP FOR THE BLIND OF 5460 WHITE OAK AVE ENCINO,CA 91316	NONE	PUBLIC	GENERAL	1,000
CHABAD HOUSE AT UCLA 612 1/2 MIDVALE AVENUE LOS ANGELES,CA 90024	NONE	PUBLIC	GENERAL	7,000
MAIMODES ACADEMY 310 NO HUNTLEY DRIVE LOS ANGELES,CA 90048	NONE	PUBLIC	GENERAL	5,000
KAHAL LEVY POBOX 4246 WEST HILLS,CA 91307	NONE	PUBLIC	GENERAL	7,500
AMERICAN FRIENDS OF OSTRAVA- BIALE 11201 WATERMILL LANE SILVER SPRINGS,MD 20902	NONE	PUBLIC	GENERAL	1,800
TORAT HAYIM HEBREW ACADEMY 1210 S LA CIENEGA BLVD LOS ANGELES,CA 90035	NONE	PUBLIC	GENERAL	6,600
AMERICAN FRIENDS OF RAMBAM 521 FIFTH AVENUE STE 1731 NEW YORK,NY 10175	NONE	PUBLIC	GENERAL	3,000
SEPHARDIC EDUCATION CENTER 6505 WILSHIRE BLVD LOS ANGELES,CA 90048	NONE	PUBLIC	GENERAL	2,600
SEPHARDIC TRADITION RECREATION 6634 VALJEAN AVENUE VAN NUYS,CA 91406	NONE	PUBLIC	GENERAL	95,000
Total				235,300

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AZUSA REFUGE FOUNDATION 1460 S ROBERTSON BLVD 112 LOS ANGELES,CA 90025	NONE	PUBLIC	GENERAL	2,600
AMERICAN FRIENDS OF KOLLEL RABBI EL 6346 SEWARD PARK S SEATTLE IS	NONE	PUBLIC	GENERAL	1,800
FOUNDATION FOR JEWISH DIVERSITY 1875 CENTURY PARK EAST STE 700 LOS ANGELES,CA 90067	NONE	PUBLIC	GENERAL	2,500
FRIENDS OF EMEK LEARNING 368 NEW HEMPSTEAD RD NEW YORK,NY 10958	NONE	PUBLIC	GENERAL	1,000
HAIAL MOSHE YOUTH P O BOX 16961 ENCINO,CA 91416	NONE	PUBLIC	GENERAL	2,600
HOLOCAUST MUSEUM 100 RAOUL WALLENBERG PALCE SW WASHINGTON,DC 20024	NONE	PUBLIC	GENERAL	1,000
GOSEPHARDIC 27 PILCHER ST STATEN ISLAND,NY 10314	NONE	PUBLIC	GENERAL	12,500
JERUSALEM U 11110 WEST OAKLAND BLVD STE 288 SUNRISE,FL 33351	NONE	PUBLIC	GENERAL	10,000
LASHA 7150 TAMPA AVENUE RESEDA,CA 91335	NONE	PUBLIC	GENERAL	5,000
LIGHT OF ISRAEL 1675 MONROE AVENUE ROCHESTER,NY 14618	NONE	PUBLIC	GENERAL	1,000
ME OHR BAIS YAAKOV 7 EMRY EMET BET SHEMESH 99000 IS	NONE	PUBLIC	GENERAL	500
MACHON MAAYAN P O BOX 15 HIGHTSTOWN,NJ 08520	NONE	PUBLIC	GENERAL	1,500
OHR CHANOCH HIGH SCHOOL 8906 WEST PICO BLVD LOS ANGELES,CA 90035	NONE	PUBLIC	GENERAL	3,600
OR HACHAIM ACADEMY 12411 SYLVAN STREET NORTH HOLLYWOOD,CA 91606	NONE	PUBLIC	GENERAL	5,000
SHAAREY YERUSHALAYIM 12435 CHANDLER BLVD VALLEY VILLAGE,CA 91607	NONE	PUBLIC	GENERAL	3,600
Total				235,300

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CHABAD OF GRANADA HILLS 11901 BALBOA BLVD GRANADA HILLS, CA 91344	NONE	PUBLIC	GENERAL	2,500
YESHIVA HIGH SCHOOL 9717 1/2 WEST PICO BLVD LOS ANGELES, CA 90035	NONE	PUBLIC	GENERAL	10,000
YESHIVA KETANA OF LOS ANGELES 12131 BURBANK BLVD VALLEY VILLAGE, CA 91607	NONE	PUBLIC	GENERAL	5,000
AMERICAN FRIENDS OF BIRKAT KOHANIM P O BOX 18361 JERUSALEM 97707 IS	NONE	PUBLIC	GENERAL	2,800
GESHER FOUNDATION 332 BLEEKER STREET NEW YORK, NY 10014	NONE	PUBLIC	GENERAL	1,800
Total			3a	235,300

TY 2015 Accounting Fees Schedule**Name:** HYMAN JEBB LEVY FOUNDATION**EIN:** 23-7422872**Software ID:** 15000324**Software Version:** 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	5,795	5,795	0	0

TY 2015 Investments Corporate Bonds Schedule**Name:** HYMAN JEBB LEVY FOUNDATION**EIN:** 23-7422872**Software ID:** 15000324**Software Version:** 2015v2.0

Name of Bond	End of Year Book Value	End of Year Fair Market Value
1482 Micron Technology	49,954	20,985
25464 Blackrock Strategic Bond TST	113,801	85,814
4000 PIMCO DYNAMIC CR INCOME FD	100,000	109,440
100000 Morgan Stanley Call 5.75%	100,494	103,427
100000 Citigroup Inc 6.125%	101,560	107,720
4000 PIMCO DYNAMIC INCOME FUND	100,000	72,120
10000 ARCH COAL INC	7,977	75
10000 COMMUNITY CHOIC	8,392	2,550
10000 KEMET CORPORATION	9,987	8,512

TY 2015 Investments Corporate Stock Schedule

Name: HYMAN JEBB LEVY FOUNDATION

EIN: 23-7422872

Software ID: 15000324

Software Version: 2015v2.0

Name of Stock	End of Year Book Value	End of Year Fair Market Value
2800 Coca-Cola Co	89,725	120,288
4264 Reynolds American Inc	15,003	196,784
1 BERKSHIRE HATHAWAY INC	37,811	197,800
500 JUNIPER NETWORKS	58,362	13,800
3500 NUVEEN FLOATING RATE INCOME FUND	46,593	35,840
1000 BAYER AKTIENGESELLSCHAFT	71,235	124,835
1019 FIRST FOUR SENIOR FLOATING RATE	17,090	12,585
1029 PIONEER FLOATING RATE TRUST	18,647	11,165
1500 ZWEIG TOTAL RETURN FUND INC	26,360	18,270
1000 COUNTRYWIDE CAPITAL IV	19,035	25,300
1001.9443 ALLIANCEBERNSTEIN GLOBAL	14,478	10,801
1000.3680 ALTRIA GROUP INC	45,249	58,231
1500.4227 ARIES CAPITAL CORP	24,876	21,381
5000.2415 REYNOLDS AMERICAN	82,202	230,761
474.3627 KINDER MORGAN INC	18,009	7,077
1500 TJX COS INC	95,527	106,365
3700.74 CYS INVTS INC COM	38,262	26,386
1501 LOWES COMPANIES INC	116,930	114,136
1075 ISHARES S&P 500 GROWTH		
206.6959 COLGATE PALMOLIVE CO	14,011	13,770
2000 GLACIER WTR T9.0625%	51,904	51,100
500 KAYNE ANDERSON MLP INVT	17,885	8,645
500 ALON USA PARTNERS LP	8,444	11,625
150 BUCKEYE PARTNERS UTS LP	11,829	9,894
5200 GUGGENHEIM CR ALLOCATION FUND	98,334	101,348
152 ALPHABET INC	115,555	118,258
176 AMAZON COM INC	113,628	118,957
2130 MICROSOFT CORP	115,245	118,172
617 PALO ALTO NETWORKS	116,515	108,678
5720 FIRST TRUST INTERNET	432,364	426,769

Name of Stock	End of Year Book Value	End of Year Fair Market Value
2015 POWERSHARES QQQ TRUST	230,301	225,398
2500 GAMCO GLOBAL GOLD NTRL R	14,159	11,875
2000 NEW MEDIA INV GRP	32,412	38,920
4500 PAYCHEX INC	221,895	238,005
1000 PIMCO INCOME OPPORTUNITY	26,175	21,170
1000 PIMCO DYNAMIC INCOME	29,870	27,360
2000 PIMCO INCOME STRATEGY FUND	20,500	17,540
500 SOUTHERN COPPER CORP	12,758	13,060
500 STARBUCKS CORP	29,953	30,015
500 WALT DISNEY CO	56,071	52,540
500 ZWEIG TOTAL RETURN	6,730	6,090
1500 COUNTRYWIDE CAP 6.75% PFD	38,751	37,950
2500 HILLMAN GRP 11.6% PFD	72,742	76,125
304.21 AT&T INC COM ISIN	10,066	10,468
75.184 COSTCO WHOLESALE CORP	10,590	12,142
707.206 FORD MTR CO DEL COM	9,817	9,965
141.441 OCCIDENTAL PETROLEUM CORP	10,041	9,563
141.219 PROCTER & GAMBLE CO	9,920	11,214
4000 ROYAL BANK OF CANADA	100,000	101,520
202.424 VERIZON COMMUNICATIONS	9,286	9,356

TY 2015 Investments Government Obligations Schedule

Name: HYMAN JEBB LEVY FOUNDATION

EIN: 23-7422872

Software ID: 15000324

Software Version: 2015v2.0

**US Government Securities - End of
Year Book Value:**

**US Government Securities - End of
Year Fair Market Value:**

**State & Local Government
Securities - End of Year Book
Value:** 100,000

**State & Local Government
Securities - End of Year Fair
Market Value:** 139,537

TY 2015 Other Assets Schedule

Name: HYMAN JEBB LEVY FOUNDATION

EIN: 23-7422872

Software ID: 15000324

Software Version: 2015v2.0

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
PASSOVER HAGGADAH BOOKS	163,100	163,100	163,100
Rounding	2	2	

TY 2015 Other Expenses Schedule

Name: HYMAN JEBB LEVY FOUNDATION

EIN: 23-7422872

Software ID: 15000324

Software Version: 2015v2.0

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK CHARGE	20			

TY 2015 Other Professional Fees Schedule

Name: HYMAN JEBB LEVY FOUNDATION

EIN: 23-7422872

Software ID: 15000324

Software Version: 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	18,986	18,986	0	0

TY 2015 Taxes Schedule**Name:** HYMAN JEBB LEVY FOUNDATION**EIN:** 23-7422872**Software ID:** 15000324**Software Version:** 2015v2.0

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX WITHHELD	649	649		
IRS- FYE 12/31/14	809			
IRS- FYE 12/31/15	2,576			

Schedule B (Form 990, 990-EZ, or 990-PF) Department of the Treasury Internal Revenue Service	Schedule of Contributors ▶ Attach to Form 990, 990-EZ, or 990-PF. ▶ Information about Schedule B (Form 990, 990-EZ, or 990-PF) and its instructions is at <u>www.irs.gov/form990</u>.	OMB No 1545-0047
		2015

Name of the organization HYMAN JEBB LEVY FOUNDATION	Employer identification number 23-7422872
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)() (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule See instructions

General Rule

- ☒
- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or other property) from any one contributor Complete Parts I and II See instructions for determining a contributor's total contributions

Special Rules

- ☐
- For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- ☐
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals Complete Parts I, II, and III
- ☐
- For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc , purposes, but no such contributions totaled more than \$1,000 If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc , purpose Do not complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc , contributions totaling \$5,000 or more during the year ▶ \$ _____

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

Name of organization HYMAN JEBB LEVY FOUNDATION	Employer identification number 23-7422872
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Part I Contributors (see instructions) Use duplicate copies of Part I if additional space is needed			
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	DONNA LEVY TRUST	\$ 2,433,173	Person <input checked="" type="checkbox"/>
	5031 ENCINO AVE		Payroll <input type="checkbox"/>
	ENCINO, CA 91316		Noncash <input checked="" type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person <input type="checkbox"/>
			Payroll <input type="checkbox"/>
			Noncash <input type="checkbox"/> <small>(Complete Part II for noncash contributions)</small>

Name of organization HYMAN JEBB LEVY FOUNDATION	Employer identification number 23-7422872
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Part II

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
1	VARIOUS COMMON STOCK SECURITIES	\$ 1,145,883	2015-07-27
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization HYMAN JEBB LEVY FOUNDATION	Employer identification number 23-7422872
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Part III

Exclusively religious, charitable, etc., contributions to organizations described in section 501(c)(7), (8), or (10) that total more than \$1,000 for the year from any one contributor. Complete columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$ _____

Use duplicate copies of Part III if additional space is needed

(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		
(a) No.from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-			
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4	Relationship of transferor to transferee	
	--		