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Form **990-PF**

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

OMB No 1545-0052

2015

Department of the Treasury Internal Revenue Service

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

Open to Public Inspection

	UI Ca	enua	r year 2015, or to	ax year beginnii	ıg	, 2015	, and ending		,	
•	7039	HW	J LEVEY FO Y 190 E SVO ON, LA 7043	C RD A	INC			A B	Employer identification number 46-4498066 Telephone number (see instance) 985-674-1443	
_		1101	ON, EM 704.					С	If exemption application is	pending, check here
(a Ch	eck a	ll that apply	Initial return Final return		Initial return of a form Amended return	ner public charity	D	1 Foreign organizations, chec	ck here
Ē	1 Cho	eck ty	pe of organization	Address chan		Name change 1(c)(3) exempt private f	oundation		2 Foreign organizations meet here and attach computation	ting the 85% test, check
		Se		nonexempt cha	ritable	trust Other taxable pounting method	private foundation	E	If private foundation status under section 507(b)(1)(A)	
		m Part	II, column (c), line 10			Other (specify) column (d) must be of	Ш	F	If the foundation is in a 60 under section 507(b)(1)(B)	
SEP &	Part	E: cc sa	nalysis of Re xpenses (The blumns (b), (c), a arily equal the an ee instructions) Contributions, qifts, grants	total of amounts and (d) may not nounts in colum)	in neces- n (a)	(a) Revenue and expenses per books	(b) Net investme	nt	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
		2	_	ndation is not required to a	ttach Sch B					
		3 4 5 =	Interest on savings and ter Dividends and interest from Gross rents.							
	_	l t	Net rental income or (loss)							
	K E V	t	Net gain or (loss) from sail Gross sales price for assets on line 6a	all						
	E N U	8 9	Capital gain net inco Net short-term capital Income modifications	al gain	e 2)					
	Ĕ		Gross sales less returns and allowances							
			Less Cost of goods sold		•					
		11	Gross profit or (loss) (atta Other income (attach							
_	_	12	Total. Add lines 1 t			0.		0.	0.	
		13 14	Other employee sala		es, etc.	0.			-	
		15	Pension plans, emple	=						
	Δ	16 a	Legal fees (attach sc	hedule)						
	A D M	ь	Accounting fees (atta	ach sch)			-			
	N	C	Other prof fees (atta	nch sch)						
	O Î	17	Interest	CENT	5					
	O I S T R R	18	Taxes (attach schedule)(se Depreciation (attach	eo instrs)	Į.		_			
	A A	19	schedule) and deplet	tion .c.	701					
	I į N V G E	20	Occupancy	. 51.12 G & D.	030-					
	_	21	Travel, conferences.	and meetings						
	A E X P E	22 23	Printing and publicat Other expenses (átta		J':=					
	E N S E S	24	Total operating and expenses. Add lines		• 1					
	3	25	Contributions, gifts, grants	~				_		
_		26	Total expenses and Add lines 24 and 25.			0.		0.	0.	0.
		27 a	Subtract line 26 from Excess of revenue or and disbursements.			0.				
		ь	Net investment inco	me (if negative enter	-0-)	U.		0.		
		1	Adjusted net income					.	0.	



Form	990-PF	(2015)	RERTRAM	.Т	LEVEY	FOUNDATION	TNC

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: U	4	4	"	u	u	u	u	

Page 2

Par	+ 11	Balance Sheets	Attached schedules and amounts in the description column should be for end-of-year amounts only	Beginning of year	End o	f year
- 41			(See instructions)	(a) Book Value	(b) Book Value	(c) Fair Market Value
	1	`Cash — non-interest	-bearing .			
	2	Savings and tempor	ary cash investments			
	3	Accounts receivable	•			
		Less allowance for	doubtful accounts •			
	4	Pledges receivable	• 			
	_	Less allowance for	doubtful accounts		<u></u>	
	5	Grants receivable				
	6	Receivables due from offic disqualified persons (attac	cers, directors, trustees, and other ch schedule) (see instructions)			
_	7	Other notes and loans rec	eivable (attach sch)			
A S	1	Less allowance for	doubtful accounts >			
Š	8	Inventories for sale	or use.			
S S E T	9	Prepaid expenses a	nd deferred charges.			
Ś	10:	a Investments – U S obligations (attach s	and state government chedule)			
		b Investments — corporate	stock (attach schedule).			
	(c Investments — corporate	bonds (attach schedule).			
	11	Investments – land, equipment basis	buildings, and			
		Less. accumulated deprec (attach schedule)	iation •			
	12	Investments - morto	gage loans			
	13	Investments - other	(attach schedule)			
	14	Land, buildings, and	equipment basis►			
		Less accumulated deprecedant (attach schedule)	nation •			
	•	Other assets (descri				
	16	Total assets (to be o	completed by all filers — Also, see page 1, item I)	0.	0.	0.
L	17	Accounts payable ar		0.	0.	0.
A	18	Grants payable				
Ê	19	Deferred revenue	j			
ļ	20	Loans from officers, direct	tors, trustees, & other disqualified persons			ļ
ī	21	Mortgages and other notes	payable (attach schedule)		 -	}
Ţ	22	Other liabilities (desc	cribe►)			į
È	22	Total liabilities (odd				
<u> </u>	23	Total liabilities (add	llow SFAS 117, check here	0.	0.	
		and complete lines	24 through 26 and lines 30 and 31.			:
N F E U T N	24	Unrestricted]			!
ΤŇ	25	Temporarily restricte	L.			1
A D	26	Permanently restrict				1
A B A L A		and complete lines 2	not follow SFAS 117, check here > 27 through 31.			
FL	27	Capital stock, trust p	rincipal, or current funds			į
SN	28	Paid-in or capital surplus,	or land, bldg., and equipment fund			Ì
οE	29	Retained earnings, accumi	ulated income, endowment, or other funds			
RS	30		und balances (see instructions)	0.	0.	
	31	Total liabilities and i (see instructions)	net assets/fund balances	0.	0.	
Parl		<u> </u>	ges in Net Assets or Fund Balance		0.]	
1	Total	I net assets or fund ba	alances at beginning of year — Part II, coluit on prior year's return)			· · · · · · · · · · · · · · · · · · ·
		r amount from Part I,			1	0.
		increases not included in lir			3	0.
		lines 1, 2, and 3				
		ases not included in line 2 (itemize)		5	0.
		,	alances at end of year (line 4 minus line 5)	- Part II. column (b)		0.
			<u> </u>		1 9 1	٠.

(a) List and descr 2-story brick wareho	ibe the kind(s) of property sold (e.g., ibuse, or common stock, 200 shares Mi	real estate, LC Company)	(b) How acquired P — Purchase	(C) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a N/A			D — Donation		<u> </u>
b					
С				_	
d					
е					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other ba plus expense of sa		(h) Gain or (e) plus (f) n	
а					
b					
С					
d					
<u>e</u>					<u> </u>
	owing gain in column (h) and owned to			(I) Gains (Col	
(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		ain minus col. (k), l an -0-) or Losses (f	
<u>a</u>					
<u>b</u>					
<u>c</u>					
d				 	
Capital gain net income or (enter in Part I, line 7	-		
3 Net short-term capital gain of	or (loss) as defined in sections 1222(5	·	2	-	
		_			
If gain, also enter in Part I, in Part I, line 8	line 8, column (c) (see instructions) I	f (loss), enter -0-	- 3		
	ler Section 4940(e) for Reduce	d Tay on Net Investo	1 -	1	
	section 4942 tax on the distributable a qualify under section 4940(e). Do not d	, ,	pase period?	Yes	No
1 Enter the appropriate amount	in each column for each year; see the in-	structions 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 as	sets (col	(d) Distribution (b) divided by	
2014					
2013					
2012					
2011					
2010	1			1	
2 Total of line 1, column (d)			2		
	. No. 5	lated and have Other Edition		 	
	r the 5-year base period — divide the to tion has been in existence if less than		ne 3		
4 Enter the net value of nonch	naritable-use assets for 2015 from Par	t X, line 5	4		
5 Multiply line 4 by line 3			5	_	
6 Enter 1% of net investment	income (1% of Part I, line 27b)		6		
7 Add lines 5 and 6			7		
8 Enter qualifying distributions	from Part XII, line 4		8		
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 r	ate See the	

	(see instructions for the definition).	וטו		<u> </u>
	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			
(Did the foundation file Form 1120-POL for this year?	1 c		X
(Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year			
	(1) On the foundation \Rightarrow 0. (2) On foundation managers \Rightarrow 0.			
•	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ►\$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		X
	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.	3		X
	a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4 a		X
١	o If 'Yes,' has it filed a tax return on Form 990-T for this year?	4 b	N/	A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		X
	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? 	6		
7	Did the foundation have at least \$5,000 in assets at any time during the year? If 'Yes,' complete Part II, col. (c), and Part XV	7		X
8 8	Enter the states to which the foundation reports or with which it is registered (see instructions)			
	LA			
(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	8 b	N/	Δ
_				
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	i i		

Form **990-PF** (2015)

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Pai	t 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		Х
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	Х	
	Website address ► N/A	<u> </u>		-
14	The books are in care of ► BERTRAM J LEVEY Telephone no ► 985-	674-1	443	
	Located at ► 7039 HWY 190 E SVC RD SUITE A COVINGTON LA ZIP + 4 ► 70433			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 — Check here	N/A	/ _ >	
	and enter the amount of tax-exempt interest received or accrued during the year			N/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, securities, or other financial account in a foreign country?	16	Yes	No X
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If 'Yes,' enter the name of the foreign country			
Par	t VII-B Statements Regarding Activities for Which Form 4720 May Be Required	ı		<u> </u>
	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.		Yes	No
1 a	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? Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? \boxed{X} No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? Yes X No			
	(6) Agree to pay money or property to a government official? (Exception. Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) Yes X 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)?	1 b	N	/A
	Organizations relying on a current notice regarding disaster assistance check here			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2015?	1 c		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)):	:		
а	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			
	If 'Yes,' list the years ► 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)	2 b	N	/A
C	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here			
	► 20 , 20 , 20 , 20			
3 a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?			
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? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2015).	3 b	N	/A
4 a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		X
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?	4 b		X
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Form 990-PF (2015) BERTRAM J LEVEY FO			46-44	98066	Page (
Part VII-B Statements Regarding Activit		1 4720 May Be Req	uired (continued)		
5a During the year did the foundation pay or incu	•	40454.00	ο	1	
(1) Carry on propaganda, or otherwise attempt	ot to influence legislatio	n (section 4945(e))	∐ Yes X	No	
(2) Influence the outcome of any specific pub on, directly or indirectly, any voter registra	ation drive?		<u> </u>	No	
(3) Provide a grant to an individual for travel,	study, or other similar	purposes?	∐ Yes X	No	
(4) Provide a grant to an organization other the in section 4945(d)(4)(A)? (see instructions)	nan a charitable, etc, or s)	ganization described	Yes X	No	
(5) Provide for any purpose other than religio educational purposes, or for the prevention	us, charitable, scientific n of cruelty to children	;, literary, or or animals?	Yes X	No	
b If any answer is 'Yes' to 5a(1)-(5), did any of described in Regulations section 53 4945 or in (see instructions)?	the transactions fail to one a current notice regard	qualify under the excep ding disaster assistance	tions	5 Ь	N/A
Organizations relying on a current notice rega	rding disaster assistance	ce check here	▶ [11/21
c If the answer is 'Yes' to question 5a(4), does tax because it maintained expenditure respon	sibility for the grant?		N/A Yes] No	
If 'Yes,' attach the statement required by Reg	ulations section 53 494	5-5(d)			
6 a Did the foundation, during the year, receive an on a personal benefit contract?			∐Yes X]No	
b Did the foundation, during the year, pay prem If 'Yes' to 6b, file Form 8870	iums, airectly or inairec	tly, on a personal bene	it contract?	6 Б	X
7a At any time during the tax year, was the found	tation a narty to a prob	ihited tax shelter transa	action? Yes X	No	
b If 'Yes,' did the foundation receive any proceed				N/A 7b	
Part VIII Information About Officers, D				,	
and Contractors	, , , , , , , , , , , , , , , , , , , ,		, , ,		,
1 List all officers, directors, trustees, foundation	n managers and their o	compensation (see inst	tructions).		
(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense other all	account, owances
BERTRAM J LEVEY	DIRECTOR	0.	0.		0
7039 HWY 190 E SVC RD STE A COVINGTON, LA 70433	0		0.		Ū
PAUL D. REES	DIRECTOR	0.	0.		0
7039 HWY 190 E SVC RD SUITE A COVINGTON, LA 70433	0				
			:		
· · · · · · · · · · · · · · · · · · ·			<u> </u>	<u> </u>	
2 Compensation of five highest-paid employees (of					
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d)Contributions to employee benefit plans and deferred compensation	(e) Expense other all	owances
NONE		=	Compensation		
		-			
Total number of other employees hald over \$50,000	·				

Form **990-PF** (2015)

Total. Add lines 1 through 3

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0.

Form 990-PF (2015)

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 (c) Compensation (b) Type of service NONE Total number of others receiving over \$50,000 for professional services 0 Part X-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 Part XB 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 N/A All other program-related investments. See instructions.

Adjusted qualifying distributions. Subtract line 5 from line 4

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 1 a b Average of monthly cash balances 1 b c Fair market value of all other assets (see instructions) 1 c d Total (add lines 1a, b, and c) 1 d 0. e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) 1 e 2 Acquisition indebtedness applicable to line 1 assets 2 Subtract line 2 from line 1d 3 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions). 4 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4 5 0. Minimum investment return. Enter 5% of line 5 6 0. Part 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.) Minimum investment return from Part X, line 6 1 2a Tax on investment income for 2015 from Part VI, line 5 2 a b Income tax for 2015 (This does not include the tax from Part VI) 2b c Add lines 2a and 2b 2 c 3 Distributable amount before adjustments Subtract line 2c from line 1 3 Recoveries of amounts treated as qualifying distributions 4 Add lines 3 and 4 5 Deduction from distributable amount (see instructions). 6 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1 7 0. Part XIII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes: a Expenses, contributions, gifts, etc — total from Part I, column (d), line 26 1 a **b** Program-related investments — total from Part IX-B 1 b 2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes 2 Amounts set aside for specific charitable projects that satisfy the a Suitability test (prior IRS approval required) 3 a **b** Cash distribution test (attach the required schedule) 3 b 4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V. line 8, and Part XIII, line 4 0. 4 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

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.

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Form 990-PF (2015)

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Part XIII Undistributed Income (see instructions)

1. Distributable amount for 2015 from Part XI, line 7 2. Ilindistributed exons, if any, as of the end of 2015. a Enter amount for 2014 only b Total for prayers: 20 20 20 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30 30		(a) Corpus	(b) Years prior to 2014	(c) 2014	(d) 2015
2 Indistributed mores, if any, as of the end of 2015. a Enter amount for 2014 only b Total for proy years: 20 _ 20 _ 20 5 Excess distributions carryover, if any, to 2019: a From 2010 b From 2011 c From 2012 d From 2013 e From 2014 f Total of lines 3a through e 4 Qualifying distributions for 2015 from Part XIII, line 4 = 8 a Applied to 2014, but not more than line 2a b Applied to 2014, but not more than line 2a b Applied to 2014, but not more than line 2a c Treated as distributions or of or ory ears (Election required see instructions) d Applied to 2015 distributions of of coryus (Election required see instructions) c Applied to 2015 distributions of of coryus (Election required see instructions) d Applied to 2015 distributions of of coryus (Election required see instructions) d Excess distributions carryover applied to 2015 c. C rest and a soft of coryus same amount must be shown in column (a)) 6 Enter the net total of each column as indicated below: a Coryus Alf lines 3f, kc, and &c, substract line 3f, brom line 2b. b Proy years' undistributed income for 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 6 Taxable amount see instructions 1 Undistributed income for 2015 Subtract lines 4d and 5 from line 1 This amount must be distributed income for years' undistributions carryover to 2016. 2 Lines and the correction of the coryus and the section 4942(a) tax has been previously assessed 3 Subtract lines 6c from line 6 Taxable amount see instructions 0 . 1 Undistributed income for 2015 Subtract lines 4d and 5 from line 7 (see instructions) 0 . 2 Excess first pathologous carryover to 2016. 3 Excess from 2011 b Excess from 2011 b Excess from 2011 b Excess from 2011 b Excess from 2012 c Excess from 2011 b Excess from 2012 c Excess from 2011					0.
b Teal for pror years: 20 , 20 , 20					
3 Excess distributions carryover, if any, to 2015: a From 2010 b From 2011 c From 2013 c From 2013 c From 2014 f Total of lines 3a through e 4. Qualifying distributions for 2015 from Part XII, line 4 b \$ 3 Applied to 2014, but not more than line 2a b Applied to 2014, but not more than line 2a b Applied to 2014, but not more or prior years (Election required — see instructions) c Treated as distributions out of corpus (Election required — see instructions) d Applied to 2015 distributable amount e Remaining amount distributed out of corpus C Excess destributions carryive applied to 2015 (if an amount appears in column (a)) f a manual appears in column (a) f a fair the not total of each column as indicated below: a Corpus Add lines 3i, 4c, and 4e. Subtract line 5 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 lines tax has been previously assessed d Subtract line 6c from line 6b d Subtract line 6c from line 6b d Subtract line 6c from line 1 This amount must be distributed income for 2015. Subtract lines d from line 1 This amount must be distributed in 2016 A Amounts freaded as distributions out of corpus to satisty requirements imposed by section 1700(f)(f)(f) or 4942(g)) (Election may be required—see instructions) 9. Excess distributions carryover from 2016, Subtract lines 7 and 8 from line 6 Subtract lines 7 and 8 from line 6 Subtract lines 7 and 8 from line 6 Subtract lines 8 from 2011 b Excess from 2011 b Excess from 2011 b Excess from 2011 b Excess from 2011 c Excess from 2011 c Excess from 2011	a Enter amount for 2014 only			0.	
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	t XIV	Private Operating Fo						N/A
	is effect	undation has received a ruling tive for 2015, enter the date	of the ru	ing		_		
		oox to indicate whether the	_		erating foundation of		4942(j)(3) or	4942(j)(5)
2 8	Enter tr income	ne lesser of the adjusted net from Part I or the minimum	t -	Tax year		Prior 3 years		
	each ye	ent return from Part X for ar listed		(a) 2015	(b) 2014	(c) 2013	(d) 2012	(e) Total
_	85% of		<u></u>					
	line 4 fo	ng distributions from Part X or each year listed						
	for active	included in line 2c not used directly conduct of exempt activities						
	for active Subtraction	ng distributions made direct re conduct of exempt activit t line 2d from line 2c						
	alternat	te 3a, b, or c for the eve test relied upon						
а		alternative test — enter:						
	` '	ue of all assets.	<u>, </u>		1			 -
+	sect	ue of assets qualifying unde tion 4942(j)(3)(B)(i) nt' alternative test — enter 2/3 of	" -					
•	minimum	investment return shown in Part X, each year listed	,					
C		t' alternative test - enter:						
	inve divid on s	al support other than gross istment income (interest, dends, rents, payments securities loans (section (a)(5)), or royalties)						
	(2) Supp	ort from general public and 5 or exempt organizations as provided ction 4942(j)(3)(B)(iii)						
	(3) Larg	gest amount of support from exempt organization	י 📙					
	(4) Gros	ss investment income						
	a	Supplementary Inform	ing the	/ear – see in	part only if the structions.)	foundation had	\$5,000 or more	in N/A
	List anv	tion Regarding Foundation managers of the foundation w any tax year (but only if the	ho have c	ontributed more th	nan 2% of the total co than \$5,000) (See	ontributions received t section 507(d)(2))	by the foundation befo	ore the
b	List any a partne	managers of the foundation wership or other entity) of whi	tho own 10 ich the foi	% or more of the indation has a 1	stock of a corporation 0% or greater inter	on (or an equally large est	portion of the owners	ship of
	Check h requests complet	s for funds If the foundation e items 2a, b, c, and d	only makes n makes g	contributions to ifts, grants, etc	preselected charitable (see instructions) to	le organizations and do individuals or organ	nizations under othe	cited er conditions,
а	The nam	e, address, and telephone nu	mber or e-	mail address of t	ne person to whom a	pplications should be	addressed	
b	The form	n in which applications shou	uld be sub	mitted and infor	mation and materia	als they should includ	de	
С	Any sub	mission deadlines:		_				
d	Any rest	rictions or limitations on aw	vards, suc	h as by geograp	hical areas, charita	ble fields, kinds of in	nstitutions, or other	factors.
BAA					EA0310L 10/13/15	-	Fo	orm 990-PF (2015)

3 Grants and Contributions Paid During the	rear or Approved for Fut	ure Paymen	<u>t</u>	N/A
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)	substantial contributor	recipient	CONTRIBUTION	
a Paid during the year	substantial contributor	recipient		
Total			► 3a	
b Approved for future payment Total			► 3a	

Part XVI-A | Analysis of Income-Producing Activities

•	Unrelated	business income		section 512, 513, or 514	(e)
Program service revenue	(a) Business code	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income (See instructions)
a					<u></u>
b					·
<u></u>					
<u>d</u>	 -				
e			-		
g Fees and contracts from government agencies	 				
2 Membership dues and assessments			 	-	·
Interest on savings and temporary cash investments					
Dividends and interest from securities			 	-	
5 Net rental income or (loss) from real estate:			+ +		
a Debt-financed property					
b Not debt-financed property			 -		
5 Net rental income or (loss) from personal property			+		
7 Other investment income.					
Gain or (loss) from sales of assets other than inventory					
Net income or (loss) from special events					
Gross profit or (loss) from sales of inventory			 		
Other revenue					· · · · · · · · · · · · · · · · · · ·
a			 		
b					
c			 		
d					
e					
Subtotal Add columns (b), (d), and (e)		-			
Total. Add line 12, columns (b), (d), and (e)	1			13	0
ee worksheet in line 13 instructions to verify calculation	ons)			_	
art XVI-B Relationship of Activities to the	Accomplisi	nment of Exemp	ot Purpose	?S	
	some is report	ed in column (e) of	Part XVI-A co		
Explain below how each activity for which in accomplishment of the foundation's exempt	purposes (othe	r than by providing	funds for suc	ontributed importantly ch purposes) (See in	y to the structions)
	purposes (othe	r than by providing	funds for suc	ontributed importantly the purposes) (See in	y to the structions)
ine No. Explain below how each activity for which in accomplishment of the foundation's exempt N/A	purposes (othe	r than by providing	funds for suc	ontributed importantly	y to the structions)
	purposes (othe	r than by providing	funds for suc	ontributed importantly	y to the structions)
	purposes (othe	r than by providing	funds for suc	ontributed importantly	y to the structions)
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	purposes (othe	r than by providing	funds for suc	ontributed importantly	y to the structions)
	purposes (othe	r than by providing	funds for suc	ontributed importantly	y to the structions)

Form 990-PF (2015) BERTRAM J LEVEY FOUNDATION INC 46-4498066 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable

	Exempt Organ	ilzations								
1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?									Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of:										
(1) Cash										X
(2) Other assets										X
	er transactions							1 a (2)		
(1) Sales of assets to a noncharitable exempt organization								1 b (1)		X
(2) Purchases of assets from a noncharitable exempt organization								1 b (2)		X
(3) Rental of facilities, equipment, or other assets								1 b (3)		X
(4) Reimbursement arrangements								1 b (4)		X
(5) Loans or loan guarantees								1 b (5)		Х
(6) Performance of services or membership or fundraising solicitations							1 b (6)		Х	
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees								1 c		X
d If the the g	e answer to any of the oods, other assets, or s transaction or sharing	e above is 'Yes,' services given by arrangement, s	complete the foll the reporting found how in column (d	owing schedule dation. If the four) the value of the	Columi dation re	n (b) should alveceived less than s, other assets,	vays show th n fair market v or services i	e fair market val value in eceived	ue of	
(a) Line no.	(b) Amount involved	(c) Name	of noncharitable exempt organization			Description of tran	ns, and sharing arrai	ngement	is	
I/A	/A									
									·	
			· - ·							
			····							
desc	e foundation directly or ribed in section 501(ces,' complete the follo	:) of the Code (o	d with, or related to ther than section	o, one or more ta 501(c)(3)) or in	x-exemp section	t organizations 527?		Yes	X	No
	(a) Name of organization	ation	(b) Type of organization			(0) Description	of relationship		
I/A										
ign Uni	der penalties of perjury. I dec rect, and complete Declarati	clare that I have exam ion of preparer (other	ined this return, includi than taxpayer) is based	ng accompanying sch d on all information o	nedules and f which pre	d statements, and to parer has any know	the best of my k ledge	nowledge and belief, i		
lere =	Signature of office or trustee Date Director								n with the shown b fuctions)	pelow 12
	Print/Type preparer's	name	Preparer's si			Date.	05	I I DTINI	Yes	No
ام احا	LAURA HORNI		Vali	111 Hor	u a_	Pullin	Check self-employ	∟"	1212	
aid			DEEC TTC	VIX / 1/2 1/1		4-110	 	1-0-010	13 <u>13</u>	
repare		WEILER AND								
se Onl	y Firm's address		VAY 190 EAS	T SERVICE	KD S	UITE A	Dh	005 674 74	4.2	
A A	<u> </u>	COVINGTON,	LA 70433				Phone no	985-674-14		
AA								Form 99	V-PF (2015)