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Form 990-PF

Department of the Treasury

Internal Revenue Service

Return of Private Foundation

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

Do not enter social security numbers on this form as it may be made public.

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

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017, or tax year beginning 01-01-2017, and ending 12-31-2017

Name of foundation

HYMAN JEBB LEVY FOUNDATION

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

6634 VALJEAN AVE

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

VAN NUYS, CA 91406

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

H Check type of organization

☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col (c), line 16)

\$ 7,862,169

J Accounting method

☐ Cash

☒ Accrual

☐ Other (specify)

(Part I, column (d) must be on cash basis)

A Employer identification number

23-7422872

B Telephone number (see instructions)

(818) 781-4552

C If exemption application is pending, check here

☐

D 1. Foreign organizations, check here

☐

2 Foreign organizations meeting the 85% test, check here and attach computation

☐

E If private foundation status was terminated under section 507(b)(1)(A), check here

☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here

☐

Part I

Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B			
	3 Interest on savings and temporary cash investments	28,939	28,939	28,939
	4 Dividends and interest from securities	175,079	175,079	175,079
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	481,789		
	b Gross sales price for all assets on line 6a			
		1,674,436		
	7 Capital gain net income (from Part IV, line 2)		481,789	
	8 Net short-term capital gain			
	9 Income modifications			
Operating and Administrative Expenses	10a Gross sales less returns and allowances			
	b Less Cost of goods sold			
	c Gross profit or (loss) (attach schedule)			
	11 Other income (attach schedule)			
	12 Total. Add lines 1 through 11	685,807	685,807	204,018
	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)			
	c Other professional fees (attach schedule)	20,786	20,786	
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	780	780	
	19 Depreciation (attach schedule) and depletion			
	20 Occupancy			
	21 Travel, conferences, and meetings			
22 Printing and publications				
23 Other expenses (attach schedule)	123			
24 Total operating and administrative expenses. Add lines 13 through 23	21,689	21,566	0	
25 Contributions, gifts, grants paid	414,800		414,800	
26 Total expenses and disbursements. Add lines 24 and 25	436,489	21,566	414,800	
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	249,318		
	b Net investment income (if negative, enter -0-)		664,241	
c Adjusted net income (if negative, enter -0-)			204,018	

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2017)

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 (a) Book Value	End of year (b) Book Value (c) Fair Market Value		
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	1,903,139	1,658,948	1,658,948
	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	100,000	148,082
	b	Investments—corporate stock (attach schedule)	3,857,066	4,461,318	5,507,085
	c	Investments—corporate bonds (attach schedule)	488,096	377,353	384,954
	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 ▶ _____)	163,100	163,100	163,100	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	6,511,401	6,760,719	7,862,169	
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	6,436,401	6,685,719	
	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)	6,436,401	6,685,719		
31	Total liabilities and net assets/fund balances (see instructions) .	6,511,401	6,760,719		

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	6,436,401
2	Enter amount from Part I, line 27a	2	249,318
3	Other increases not included in line 2 (itemize) ▶ _____	3	
4	Add lines 1, 2, and 3	4	6,685,719
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	6,685,719

Part IV Capital Gains and Losses for Tax on Investment Income

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

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 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			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
a See Additional Data Table			
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div> <div>If gain, also enter in Part I, line 7</div> <div>If (loss), enter -0- in Part I, line 7</div> </div>	2	481,789
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	-30,393

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))
2016	301,200	7,000,250	0 04303
2015	235,300	5,731,944	0 04105
2014	368,437	4,870,062	0 07565
2013	419,838	4,881,403	0 08601
2012	225,675	4,852,327	0 04651

2 Total of line 1, column (d)	2	0 292248
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 058450
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	7,259,916
5 Multiply line 4 by line 3	5	424,342
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,642
7 Add lines 5 and 6	7	430,984
8 Enter qualifying distributions from Part XII, line 4	8	414,800

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 instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	13,285
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	
3	Add lines 1 and 2.	3	13,285
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	13,285
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	2,402
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d.	7	2,402
8	Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8	14
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	10,897
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2018 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? <i>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</i>	1b	No
c Did the foundation file Form 1120-POL for this year?	1c	No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ _____ (2) On foundation managers <input type="checkbox"/> \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities</i>	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	No
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T</i>	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> 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? <i>If "No," attach explanation</i> .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9	No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i>	10	No

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 2017, 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.

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(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"/> 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 2017? <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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? <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 2017 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 2017). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No 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 2017? 4b			No

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

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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
HYMAN LEVY 6634 VALJEAN AVE VAN NUYS, CA 91406	President 5 00	0		

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

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

Total number of other employees paid over \$50,000. ►**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	5,725,428
b	Average of monthly cash balances.	1b	1,481,945
c	Fair market value of all other assets (see instructions).	1c	163,100
d	Total (add lines 1a, b, and c).	1d	7,370,473
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	7,370,473
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	110,557
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	7,259,916
6	Minimum investment return. Enter 5% of line 5.	6	362,996

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	362,996
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	13,285
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	13,285
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	349,711
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	349,711
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	349,711

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	414,800
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	414,800
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	414,800

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 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				349,711
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.				
b Total for prior years 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2017				
a From 2012.				
b From 2013.				179,292
c From 2014.				130,080
d From 2015.				
e From 2016.				
f Total of lines 3a through e.	309,372			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 414,800				
a Applied to 2016, 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 2017 distributable amount.				349,711
e Remaining amount distributed out of corpus	65,089			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	374,461			
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 2016 Subtract line 4a from line 2a Taxable amount—see instructions				
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				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 2012 not applied on line 5 or line 7 (see instructions).				
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	374,461			
10 Analysis of line 9				
a Excess from 2013.				179,292
b Excess from 2014.				130,080
c Excess from 2015.				
d Excess from 2016.				
e Excess from 2017.				65,089

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

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2017, enter the date of the ruling. ▶					
b Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2017	(b) 2016	(c) 2015	(d) 2014	
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 <input type="checkbox"/> if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.	
a The name, address, and telephone number or e-mail address of the person to whom applications should be addressed 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 <i>Paid during the year</i> See Additional Data Table				
Total			3a	414,800
b <i>Approved for future payment</i>				
Total			3b	

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments.						
3 Interest on savings and temporary cash investments			14	28,939		
4 Dividends and interest from securities.			14	175,079		
5 Net rental income or (loss) from real estate						
a Debt-financed property.						
b Not debt-financed property.						
6 Net rental income or (loss) from personal property						
7 Other investment income.						
8 Gain or (loss) from sales of assets other than inventory			18			481,789
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal Add columns (b), (d), and (e).				204,018		481,789
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13			685,807

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

[illegible]

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

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.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No

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

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

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

b If "Yes," complete the following schedule

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

Sign Here	Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.	***** 2018-05-15 Date	***** Title	May the IRS discuss this return with the preparer shown below (see instr)? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
	Signature of officer or trustee			

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
	L LARRY CLUMECK				P01371460
	Firm's name ▶ Clumbeck Stern Schenkelberg & Getzoff				
	Firm's address ▶ 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)
4264 R J REYNOLDS (RAI)	P	1995-02-24	2017-07-25
100000 CITIGROUP INC 6 125% \$102,328 45	P	2011-11-29	2017-11-21
500 JUNIPER NETWORKS (JNPR)	P	2000-06-12	2017-12-28
656 FIRST TRUST INTERNET (FDN)	P	2016-08-09	2017-01-13
309 SPDR DOW JONES INDUSTRIAL AVRG (DIA)	P	2016-07-14	2017-01-13
326 VANGUARD S&P EFT (VOO)	P	2016-07-11	2017-01-13
485 EAGLE MATERIAL INC (EXP)	P	2017-01-30	2017-04-28
986 ISHARES MORN SMALL CAP (JKL)	P	2017-01-11	2017-05-25
486 EAGLE MATERIAL INC (EXP)	P	2017-01-30	2017-06-20
903 STARBUCKS CORP (SBUX)	P	2017-05-27	2017-08-02

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)
280,850		15,003	265,847
100,000		100,000	
14,434		58,363	-43,929
55,069		51,671	3,398
61,374		60,665	709
67,833		63,874	3,959
46,520		52,832	-6,312
136,698		143,648	-6,950
44,453		52,941	-8,488
48,676		55,059	-6,383

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			(I) 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	Adjusted basis (j) as of 12/31/69	Excess of col (i) (k) over col (j), if any	
			265,847
			-43,929
			3,398
			709
			3,959
			-6,312
			-6,950
			-8,488
			-6,383

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)
866 STARBUCKS CORP (SBUX)	P	2017-05-19	2017-08-02
61 AMAZON COM INC (AMZN)	P	2017-03-30	2017-08-24
47 PRICELINE GROUP (PCLN)	P	2016-08-09	2017-08-22
68 ALPHABET INC (GOOGL)	P	2016-08-09	2017-08-24
32 PRICELINE GROUP (PCLN)	P	2016-08-09	2017-11-07
10000 KEMET CORPORATION 10 5% DUE 5/1/18	P	2013-12-17	2017-05-29
1999 7585 REYNOLDS AMERICAN (RAI)	P	2010-06-03	2017-07-25
2000 REYNOLDS AMERICAN (RAI)	P	2010-08-17	2017-07-25
51 486 REYNOLDS AMERICAN (RAI)	P	2013-10-13	2017-07-25
51 82 REYNOLDS AMERICAN (RAI)	P	2014-01-03	2017-07-25

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)
46,681		53,227	-6,546
57,916		53,391	4,525
85,392		66,182	19,210
62,574		55,089	7,485
53,484		45,060	8,424
10,000		9,988	12
131,714		26,456	105,258
131,729		27,999	103,730
3,391		1,260	2,131
3,413		1,276	2,137

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			(I) 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	
			-6,546
			4,525
			19,210
			7,485
			8,424
			12
			105,258
			103,730
			2,131
			2,137

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

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)
51 177 REYNOLDS AMERICAN (RAI)	P	2014-04-02	2017-07-25
846 REYNOLDS AMERICAN (RAI)	P	2014-05-08	2017-07-25
1000 368 ALTRIA GROUP INC (MO)	P	2010-12-10	2017-07-28
1630 BRIT AMERICAN TOBACCO SPONSORED (BTI)	P	2017-07-25	2017-11-14
1000 UNITED STATES NATURAL GAS (UNG)	P	2016-06-29	2017-12-12
4 ARCH COAL INC (ARCH)	P	2013-12-17	2017-12-08

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)
3,371		1,375	1,996
55,725		23,837	31,888
62,822		45,249	17,573
104,573		112,878	-8,305
5,408		8,469	-3,061
336		6,855	-6,519

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) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			1,996
			31,888
			17,573
			-8,305
			-3,061
			-6,519

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>				
BETH MIDRASH MISHKAN ISRAEL PO BOX 5351 NO HOLLYWOOD, CA 91616	NONE	PUBLIC	GENERAL	5,100
AMERICAN FRIENDS OF ISRAEL ELWYN PO BOX 828284 PHILADELPHIA, PA 19182	NONE	PUBLIC	GENERAL	5,000
GIMMEL FOUNDATION10 WEST 86TH ST NEW YORK, NY 10024	NONE	PUBLIC	GENERAL	15,000
AMERICAN FRIENDS OF MAAGALIM 4101 PINE TREE DRIVE MIAMI BEACH, FL 33140	NONE	PUBLIC	GENERAL	2,600
ISRAEL SPECIAL KIDS FUND 505 8TH AVENUE NEW YORK, NY 10018	NONE	PUBLIC	GENERAL	10,000
Total ▶ 3a				414,800

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>				
AMERICAN FRIENDS OF BIRKAT P O BOX 18361 JERUSALEM 97707 IS	NONE	PUBLIC	GENERAL	2,600
AMERICAN FRIENDS OF YESHIVAT HAMEIR 75-64 183RD ST FLUSHING, NY 11366	NONE	PUBLIC	GENERAL	2,600
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	7,500
KAHAL LEVYPOBOX 4246 WEST HILLS, CA 91307	NONE	PUBLIC	GENERAL	5,000
Total ▶ 3a				414,800

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>				
AMERICAN FRIENDS OF YESHIVOT BNEI A AFTAU/360 LEXINGTON AVE 300 NEW YORK, NY 10107	NONE	PUBLIC	GENERAL	3,600
TORAT HAYIM HEBREW ACADEMY 1210 S LA CIENEGA BLVD LOS ANGELES, CA 90035	NONE	PUBLIC	GENERAL	43,600
ACADEMY FOR JEWISH RELIGION 3250 WILSHIRE BLVD LOS ANGELES, CA 90010	NONE	PUBLIC	GENERAL	15,000
AMERICAN JEWISH COMMITTEE 11766 WILSHIRE BLVD SUITE 800 LOS ANGELES, CA 90025	NONE	PUBLIC	GENERAL	5,000
SEPHARDIC TRADITION RECREATION 6634 VALJEAN AVENUE VAN NUYS, CA 91406	NONE	PUBLIC	GENERAL	160,000
Total ► 3a				414,800


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>				
CENTRAL FUNDS OF ISRAEL 86 ARGYLL RD NEW ROCHELLE, NY 10804	NONE	PUBLIC	GENERAL	5,000
CHABAD HIMALAYAS INC 1376 CARROL ST BROOKLYN IS	NONE	PUBLIC	GENERAL	5,000
CLARION FUND 1856 N NOB HILL RD SUITE 210 PLANTATION, FL 33322	NONE	PUBLIC	GENERAL	10,000
CHASDEI YITZCHOKP O BOX 50291 JERUSALEM IS	NONE	PUBLIC	GENERAL	5,000
HOLOCAUST MUSEUM 100 RAOUL WALLENBERG PALCE SW WASHINGTON, DC 20024	NONE	PUBLIC	GENERAL	1,000
Total ► 3a				414,800

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>				
GOSEPHARDIC27 PILCHER ST STATEN ISLAND, NY 10314	NONE	PUBLIC	GENERAL	15,000
EM HABANIM SEPHARDIC CONGREGATION 5850 LAUREL CANYON BLVD NOTH HOLLYWOOD, CA 91607	NONE	PUBLIC	GENERAL	5,000
JEM FAMILY FUNDP O BOX 2757 BEVERLY HILLS, CA 90212	NONE	PUBLIC	GENERAL	5,000
MERCAZ BETH JACOBP O BOX 5097 JERUSALEM IS	NONE	PUBLIC	GENERAL	10,000
ME OHR BAIS YAAKOV7 EMRY EMET BET SHEMESH 99000 IS	NONE	PUBLIC	GENERAL	1,000
Total ► 3a				414,800

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				
MESORES ROCHEL SEMINARY FOR TEACHER 126 BATES DRIVE MONSEY, NY 10952	NONE	PUBLIC	GENERAL	1,500
OHR CHANOCH HIGH SCHOOL 8906 WEST PICO BLVD LOS ANGELES, CA 90035	NONE	PUBLIC	GENERAL	2,600
HARKHAM GAON ACADEMY 5870 WEST OLYMPIC BLVD LOS ANGELES, CA 90036	NONE	PUBLIC	GENERAL	5,000
SHAAREY YERUSHALAYIM 12435 CHANDLER BLVD VALLEY VILLAGE, CA 91607	NONE	PUBLIC	GENERAL	5,000
JEWISH LIFE FOUNDATION 16501 VENTURA BLVD ENCINO, CA 91436	NONE	PUBLIC	GENERAL	10,000
Total 				414,800
3a				

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>				
YESHIVA KETANA OF LOS ANGELES 12131 BURBANK BLVD VALLEY VILLAGE, CA 91607	NONE	PUBLIC	GENERAL	2,600
NEFESH HA CHAIM10 MEADOW LANE MONSEY, NY 10952	NONE	PUBLIC	GENERAL	1,800
NISHMAS KIDOSHIM977 E 26TH ST BROOKLYN, NY 11210	NONE	PUBLIC	GENERAL	2,600
PROVIDENCE TARZANA FOUNDATION 18321 CLARK STREET TARZANA, CA 91356	NONE	PUBLIC	GENERAL	5,000
AMERICAN FRIENDS OF RAMBAM 420 LEXINGTON AVE NEW YORK, NY 10170	NONE	PUBLIC	GENERAL	7,500
Total 				414,800
3a				

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>				
WEST COAST TORAH CENTER 322 FOOTHILL RD BEVERLY HILLS, CA 90210	NONE	PUBLIC	GENERAL	5,000
LASHA26500 W AGOURA RD CALABASAS, CA 91302	NONE	PUBLIC	GENERAL	1,000
THE SCHECHTER INSTITUTES BOX 3566 POB 8500 PHILADELPHIA, PA 19178	NONE	PUBLIC	GENERAL	10,000
YESHIVA NER ARYEH 12422 CHANDLER BLVD VALLEY VILLAGE, CA 91607	NONE	PUBLIC	GENERAL	1,000
ZAKA SEARCH RESCUE 11 BROADWAY 518 NEW YORK, NY 10004	NONE	PUBLIC	GENERAL	2,600
Total ▶ 3a				414,800

TY 2017 Investments Corporate Bonds Schedule**Name:** HYMAN JEBB LEVY FOUNDATION**EIN:** 23-7422872**Software ID:** 17005038**Software Version:** 2017v2.2**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
1482 Micron Technology	49,954	60,940
8979 BLACKROCK DEBT STRATEGIES FUND INC	119,007	105,054
4000 PIMCO DYNAMIC CR INCOME FD	100,000	89,760
4000 PIMCO DYNAMIC INCOME FUND	100,000	120,200
10000 COMMUNITY CHOIC	8,392	9,000

TY 2017 Investments Corporate Stock Schedule**Name:** HYMAN JEBB LEVY FOUNDATION**EIN:** 23-7422872**Software ID:** 17005038**Software Version:** 2017v2.2

Name of Stock	End of Year Book Value	End of Year Fair Market Value
2800 Coca-Cola Co	89,725	128,464
1 BERKSHIRE HATHAWAY INC	37,811	297,600
3500 NUVEEN FLOATING RATE INCOME FUND	46,593	39,235
4000 BAYER AKTIENGESELLSCHAFT	71,235	124,360
1019 FIRST TRUST SENIOR FLOATING RATE	17,090	13,145
1029 PIONEER FLOATING RATE TRUST	18,647	11,803
1665 VIRTUS GLOBAL DIVID INCOME FUND	28,416	22,311
3187.087 ALLIANCEBERNSTEIN GLOBAL	41,557	40,667
3208.915 ARES CAPITAL CORP	50,636	50,444
953.70 KINDER MORGAN INC	27,559	17,233
1500 TJX COS INC	95,527	114,690
4709.301 CYS INVTS INC COM	45,053	37,816
216.108 COLGATE-PALMOLIVE CO	14,673	16,305
2000 GLACIER WTR T9.0625%	51,904	53,200
3541.819 KAYNE ANDERSON MLP INVT	69,288	67,472
832.469 ALON USA PARTNERS LP	11,509	14,227
244.967 BUCKEYE PARTNERS LP	18,325	12,138
5200 GUGGENHEIM CR ALLOCATION FUND	98,334	114,036
2207.583 NEW MEDIA INV GRP	35,364	37,043
4500 PAYCHEX INC	221,895	306,360
1625.541 PIMCO INCOME OPPORTUNITY	41,285	42,118
3982.012 PIMCO DYNAMIC INCOME	113,284	119,659
3263.493 PIMCO INCOME STRATEGY FUND	32,594	34,038
500 SOUTHERN COPPER CORP	12,758	23,725
750 STARBUCKS CORP	44,442	43,073
700 WALT DISNEY CO	75,250	75,257
551.660 VIRTUS GLOBAL DIVID INCOME FD	7,381	7,392
2500 HILLMAN GRP 11.6% PFD	72,742	85,860
336.409 AT&T INC COM ISIN	11,300	13,080
80.024 COSTCO WHOLESALE CORP	11,408	14,994

Name of Stock	End of Year Book Value	End of Year Fair Market Value
799.837 FORD MTR CO DEL COM	10,934	9,990
154.761 OCCIDENTAL PETROLEUM CORP	10,916	11,400
150.334 PROCTER & GAMBLE CO	10,706	13,813
222.045 VERIZON COMMUNICATIONS	10,254	11,753
69 ALPHABET INC CLASS A	55,900	72,685
5991 FIRST TRUST INTERNET	508,375	658,291
2371 POWERSHARES QQQ TRUST	286,831	368,307
2585 SPDR DOW JONES INDUSTRIAL AVRG	490,719	639,477
2475 VANGUARD S & P 500 ETF	484,929	607,093
1060.802 BLACKROCK GLOBAL OPPORTUNITIES	12,439	13,271
1087.348 EATON VANCE TAX MAN GL D	9,353	10,199
11036.44 GAMCO GLOBAL GOLD NTRL R	63,708	57,498
2206.711 KCAP FINL INC	8,350	7,525
750 WILLIAMS COMPANIES	15,871	22,868
1407.306 CYS INVESTMENTS	11,523	11,301
1063.566 GLOBAL X SUPERDIVIDEND	22,093	23,164
1 CALIFORNIA RES CORP COM NEW	13	19
2242 BRITISH AMERICAN TOBACCO	155,259	150,192
61 AMAZON COM INC	53,391	71,338
338 APPLE INC	59,510	57,200
732 NETFLIX INC	101,830	140,515
1150 FIRST TRUST NYSE ARCA	146,169	143,255
1560.669 A T & T INC	63,681	60,679
500 ARCH COAL INC	37,884	46,580
1000 BRIT AMER TOBACCO	69,250	66,990
200 LAB CO OF AMERICA HLDG	26,939	31,902
500 MACQUARIE INFRASTRUCTURE	32,055	32,100
1000 NEUBERGER BERMAN MLP INC	9,335	9,280
1000 OAKTREE STRATEGIC INC	8,605	8,400
2500 PROSPECT CAPITAL CO	22,930	16,850

Name of Stock	End of Year Book Value	End of Year Fair Market Value
1000 SEASPAN CORP	24,133	24,300
1000 TELEFONICA SA	9,807	9,680
1556.011 VERIZON COMMUNICATION	79,806	82,360
500 VODAFONE GROUP	12,730	15,950
500 AMERIGAS PARTNERS LP	21,505	23,115

TY 2017 Investments Government Obligations Schedule**Name:** HYMAN JEBB LEVY FOUNDATION**EIN:** 23-7422872**Software ID:** 17005038**Software Version:** 2017v2.2**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:**

148,082

TY 2017 Other Assets Schedule**Name:** HYMAN JEBB LEVY FOUNDATION**EIN:** 23-7422872**Software ID:** 17005038**Software Version:** 2017v2.2**Other Assets Schedule**

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

TY 2017 Other Expenses Schedule**Name:** HYMAN JEBB LEVY FOUNDATION**EIN:** 23-7422872**Software ID:** 17005038**Software Version:** 2017v2.2**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
BANK CHARGES	123			

TY 2017 Other Professional Fees Schedule**Name:** HYMAN JEBB LEVY FOUNDATION**EIN:** 23-7422872**Software ID:** 17005038**Software Version:** 2017v2.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY FEES	20,786	20,786	0	0

TY 2017 Taxes Schedule**Name:** HYMAN JEBB LEVY FOUNDATION**EIN:** 23-7422872**Software ID:** 17005038**Software Version:** 2017v2.2

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX WITHHELD	780	780		