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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.

Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No. 1545-0052

2019

Open to Public Inspection

For calendar year 2019, or tax year beginning 01-01-2019, and ending 12-31-2019

Name of foundation
THE CHARLES AND MARGARET LEVIN
FAMILY FOUNDATION INC

Number and street (or P.O. box number if mail is not delivered to street address)
11151 VEIRS MILL ROAD

City or town, state or province, country, and ZIP or foreign postal code
WHEATON, MD 20902

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) ▶ \$ 8,853,715

J Accounting method:

☒ Cash

☐ Accrual

☐ Other (specify) _____
(Part I, column (d) must be on cash basis.)

A Employer identification number

52-1917299

B Telephone number (see instructions)

(301) 942-6800

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 ▶ ☒ if the foundation is **not** required to attach Sch. B

3 Interest on savings and temporary cash investments

4 Dividends and interest from securities . . .

5a Gross rents

b Net rental income or (loss) _____

6a Net gain or (loss) from sale of assets not on line 10

b Gross sales price for all assets on line 6a 51,994

7 Capital gain net income (from Part IV, line 2) . . .

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances _____

b Less: Cost of goods sold

c Gross profit or (loss) (attach schedule)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

Operating and Administrative Expenses

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)

17 Interest

18 Taxes (attach schedule) (see instructions) . . .

19 Depreciation (attach schedule) and depletion . . .

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

24 Total operating and administrative expenses.
Add lines 13 through 23

25 Contributions, gifts, grants paid

26 Total expenses and disbursements. Add lines 24 and 25

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

b Net investment income (if negative, enter -0-)

c Adjusted net income (if negative, enter -0-) . . .

For Paperwork Reduction Act Notice, see instructions.

Cat. No. 11289X

Form 990-PF (2019)

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	44,565	22,688	22,688
	2 Savings and temporary cash investments	199,590	296,848	296,848
	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)			
	b Investments—corporate stock (attach schedule)	7,758,822	7,441,430	8,534,179
	c Investments—corporate bonds (attach schedule)			
	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 ▶ _____)				
16 Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	8,002,977	7,760,966	8,853,715	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶ _____)	224	0	
	23 Total liabilities (add lines 17 through 22)	224	0	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ▶ ☐ and complete lines 24, 25, 29 and 30.			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ▶ ☒ and complete lines 26 through 30.			
	26 Capital stock, trust principal, or current funds	0	0	
	27 Paid-in or capital surplus, or land, bldg., and equipment fund	0	0	
	28 Retained earnings, accumulated income, endowment, or other funds	8,002,753	7,760,966	
29 Total net assets or fund balances (see instructions)	8,002,753	7,760,966		
30 Total liabilities and net assets/fund balances (see instructions) .	8,002,977	7,760,966		

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 29 (must agree with end-of-year figure reported on prior year's return)	1	8,002,753
2 Enter amount from Part I, line 27a	2	-242,011
3 Other increases not included in line 2 (itemize) ▶ _____	3	224
4 Add lines 1, 2, and 3	4	7,760,966
5 Decreases not included in line 2 (itemize) ▶ _____	5	0
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	7,760,966

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.)
1 a MORGAN STANLEY 8597 LT COVERED			2019-12-31
b MORGAN STANLEY 0283 LT COVERED			2019-12-31
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 38,550			38,550
b 13,444			13,444
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			38,550
b			13,444
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	51,994
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	

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))
2018	405,491	8,452,089	0.047975
2017	426,578	8,428,042	0.050614
2016	439,995	8,444,580	0.052104
2015	451,274	8,925,485	0.050560
2014	472,898	9,354,861	0.050551

2 Total of line 1, column (d)	2	0.251804
3 Average distribution ratio for the 5-year base period—divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	0.050361
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5	4	8,233,092
5 Multiply line 4 by line 3	5	414,627
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	1,819
7 Add lines 5 and 6	7	416,446
8 Enter qualifying distributions from Part XII, line 4	8	419,118

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 ☐ 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	1	1,819
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	0
3	Add lines 1 and 2.	3	1,819
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1,819
6	Credits/Payments:		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	0
b	Exempt foreign organizations—tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	4,680
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	4,680
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	69
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed ▶	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid ▶	10	2,792
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax ▶ 2,792 Refunded ▶	11	0

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?		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>		No
c Did the foundation file Form 1120-POL for this year?		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ \$ 0 (2) On foundation managers. ▶ \$ 0		
e 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? <i>If "Yes," attach a detailed description of the activities.</i>		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>		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		No
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? <i>If "Yes," attach the statement required by General Instruction T.</i>		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?	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>	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ MD		
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>	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 2019 or the taxable year beginning in 2019? See the instructions for Part XIV. <i>If "Yes," complete Part XIV</i>		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>		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 ▶ THE FOUNDATION Telephone no. ▶ (301) 946-3448			

Located at **▶** 11151 VIERS MILL RD WHEATON MD ZIP+4 **▶** 20902

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —check here ▶ ☐			
	and enter the amount of tax-exempt interest received or accrued during the year ▶ 15			
16	At any time during calendar year 2019, 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
	See the instructions for exceptions and filing requirements for FinCEN Form 114. If "Yes", enter the name of the foreign country ▶			

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? ☐ Yes ☒ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ 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 ☒ 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 ☒ 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 1b		
	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 2019? 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 2019, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2019? ☐ Yes ☒ 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.) 2b		
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? ☐ Yes ☒ No		
b	If "Yes," did it have excess business holdings in 2019 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 2019.) 3b		
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 2019? 4b		No

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

		Yes	No
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))?	☐ Yes ☒ No	
(2)	Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No	
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions.	☐ Yes ☒ No	
(5)	Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No	
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance? See instructions		5b
	Organizations relying on a current notice regarding disaster assistance check here. ► ☐		
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	☐ Yes ☐ No	
	If "Yes," attach the statement required by Regulations section 53.4945–5(d).		
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	☐ Yes ☒ No	6b
	If "Yes" to 6b, file Form 8870.		No
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No		
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?		7b
8	Is the foundation subject to the section 4960 tax on payment(s) of more than \$1,000,000 in remuneration or excess parachute payment during the year?	☐ Yes ☒ 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	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
ABBE LEVIN 11151 VEIRS MILL ROAD WHEATON, MD 20902	DIRECTOR 0.10	0	0	0
ALAN LEVIN 11151 VEIRS MILL RD WHEATON, MD 20902	DIRECTOR 0.10	0	0	0

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

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

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

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over \$50,000 for professional services.		0

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 NOT APPLICABLE	0
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 NOT APPLICABLE	0
2	
All other program-related investments. See instructions.	
3	
Total. Add lines 1 through 3	0

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	8,071,798
b	Average of monthly cash balances.	1b	286,671
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	8,358,469
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	0
3	Subtract line 2 from line 1d.	3	8,358,469
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	125,377
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	8,233,092
6	Minimum investment return. Enter 5% of line 5.	6	411,655

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	411,655
2a	Tax on investment income for 2019 from Part VI, line 5.	2a	1,819
b	Income tax for 2019. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	1,819
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	409,836
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	409,836
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	7	409,836

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	419,118
b	Program-related investments—total from Part IX-B.	1b	0
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	419,118
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	1,819
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	417,299

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				409,836
2 Undistributed income, if any, as of the end of 2019:				
a Enter amount for 2018 only.			413,031	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2019:				
a From 2014.				
b From 2015.				
c From 2016.				
d From 2017.				
e From 2018.				
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2019 from Part XII, line 4: ► \$ <u>419,118</u>				
a Applied to 2018, but not more than line 2a			413,031	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2019 distributable amount.				6,087
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2019. (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:	0			
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b. Taxable amount—see instructions.		0		
e Undistributed income for 2018. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2019. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				403,749
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions).	0			
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions). . . .	0			
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9:				
a Excess from 2015.				
b Excess from 2016.				
c Excess from 2017.				
d Excess from 2018.				
e Excess from 2019.				

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 2019, enter the date of the ruling. ▶

b Check box to indicate whether the organization is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 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) 2019	(b) 2018	(c) 2017	(d) 2016	
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 foundation had \$5,000 or more in assets at any time during the year—see instructions.)

1 Information Regarding Foundation Managers:

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

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. to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions

a The name, address, and telephone number or email address of the person to whom applications should be addressed:

b The form in which applications should be submitted and information and materials they should include:

c Any submission deadlines:

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

Part XV **Supplementary Information** (continued)**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	415,368
b <i>Approved for future payment</i>				
Total			3b	0

Enter gross amounts unless otherwise indicated.

[illegible]

Part XVII

- ## Part XVII

Part XVII

- ## Part XVII

Part XVII

Part XVII

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>				
ALL HANDS & HEARTS 6 COUNTY ROAD SUITE 6 MATTAPOISETT, MA 02739		PC	CHARITABLE CONTRIBUTION	1,000
A WIDER CIRCLE9159 BROOKEVILLE RD SILVER SPRING, MD 20910		PC	CHARITABLE CONTRIBUTION	2,000
AMERICAN GATEWAY 314 E HIGHLAND MALL BLVD SUITE 501 AUSTIN, TX 78752		PC	CHARITABLE CONTRIBUTION	500
Total ▶ 3a				415,368

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>				
AMERICARES88 HAMILTON AVENUE STAMFORD, CT 06902		PC	CHARITABLE CONTRIBUTION	2,000
AMERICAN LUNG ASSOCIATION 55 W WACKER DRIVE SUITE 1150 CHICAGO, IL 60601		PC	CHARITABLE CONTRIBUTION	1,000
BEST BUDDIES INT'L 100 SE 2ND STREET STE 2200 MIAMI, FL 33131		PC	CHARITABLE CONTRIBUTION	1,500
Total ▶ 3a				415,368

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>				
BETHESDA CHEVY CHASE RESCUE 5020 BATTERY LANE CHEVY CHASE, MD 20814		PC	CHARITABLE CONTRIBUTION	500
B'NAI ISRAELPO BOX 3263 WASHINGTON, DC 20005		PC	CHARITABLE CONTRIBUTION	18
AMERICAN RED CROSS 430 17TH STREET NW WASHINGTON, DC 20006		PC	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				415,368

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				
BREAD FOR THE CITY 1525 SEVENTH ST NW WASHINGTON, DC 20001		PC	CHARITABLE CONTRIBUTION	5,000
BROADWAY CARES 165 WEST 46TH STREET 1300 NEW YORK, NY 10036		PC	CHARITABLE CONTRIBUTION	1,000
ANNUCIATION HOUSE 1003 E SAN ANTONIO AVE EL PASO, TX 79901		PC	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				415,368

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 EL CONGREGATION 8101 PARK HEIGHTS AVE PIKESVILLE, MD 21208		PC	CHARITABLE CONTRIBUTION	1,000
CHABAD CENTER 11621 SEVEN LOCKS ROAD POTOMAC, MD 20854		PC	CHARITABLE CONTRIBUTION	100
CHARITY NAVIGATOR 139 HARRISTOWN RD GLEN ROCK, NJ 07452		PC	CHARITABLE CONTRIBUTION	500
Total ▶ 3a				415,368

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>				
BETHESDA CARES 7728 WOODMONT AVENUE BETHESDA, MD 20814		PC	CHARITABLE CONTRIBUTION	2,000
CHILDREN'S INN AT NIH7 WEST DRIVE BETHESDA, MD 20814		PC	CHARITABLE CONTRIBUTION	1,000
CRISIS AID INTERNATIONAL PO BOX 510167 ST LOUIS, MO 63151		PC	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				415,368

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>				
BRAINY CAMPS ASSOCIATION 1 IVENTA PLACE 4TH FLOOR WEST SILVER SPRING, MD 20910		PC	CHARITABLE CONTRIBUTION	1,000
DAYS END HORSE FARMPO BOX 309 LISBON, MD 21765		PC	CHARITABLE CONTRIBUTION	1,000
DC CENTRAL KITCHEN 425 2ND STREET NW WASHINGTON, DC 20001		PC	CHARITABLE CONTRIBUTION	4,000
Total ▶ 3a				415,368

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>				
DOCTORS WITHOUT BORDERS 333 SEVENTH AVE 2ND FLOOR NEW YORK, NY 10001		PC	CHARITABLE CONTRIBUTION	5,000
CAL STATE UBS ELLEN WEISSEN THEATHRE SHOWCASE 5500 UNIVERSITY PARKWAY SAN BERNARDINO, CA 92407		PC	CHARITABLE CONTRIBUTIONS	1,500
CAPITAL AREA FOODBANK 4900 PUERTO RICO AVE NE WASHINGTON, DC 20017		PC	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				415,368

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>				
FOOD & FRIENDS219 RIGGS RD NE WASHINGTON, DC 20011		PC	CHARITABLE CONTRIBUTION	25,000
CAPITAL CITY PUBLIC CHARTER SCHOOLS DC 100 PEABODY STREET NW WASHINGTON, DC 20011		PC	CHARITABLE CONTRIBUTION	2,500
CAPITAL JEWISH MUSEUM 1319 F STREET NW UNITY 810 WASHINGTON, DC 20004		PC	CHARITABLE CONTRIBUTION	5,000
Total ▶ 3a				415,368

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>				
CATALOGUE FOR PHILANTHROPY GREATER WASHINGTON 10 G STREET NE 600 WASHINGTON, DC 20002		PC	CHARITABLE CONTRIBUTION	250
CHESAPEAKE BAY FOUNDATION 6 HERNDON AVENUE ANNAPOLIS, MD 21403		PC	CHARITABLE CONTRIBUTION	500
CITY MEALS ON WHEELS 355 LEXINGTON AVENUE NEW YORK, NY 10017		PC	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				415,368

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>				
CITY WILDLIFE INC 15 OGLETHORPE STREET NW WASHINGTON, DC 20011		PC	CHARITABLE CONTRIBUTION	1,000
HTAA1840 UNIVERSITY BLVD SILVER SPRING, MD 20902		PC	CHARITABLE CONTRIBUTION	20,530
HUMANE RESCUE ALLIANCE 71 OGLETHORPE ST NW WASHINGTON, DC 20011		PC	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				415,368

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>				
CLEVELAND PLAYHOUSE 1901 E 13TH STREET CLEVELAND, OH 44114		PC	CHARITABLE CONTRIBUTION	180
COMFORT CASES 15825 SHADY GROVE RD 60 ROCKVILLE, MD 20850		PC	CHARITABLE CONTRIBUTION	250
INTERNATIONAL RELIEF TEAMS 4560 ALVARADO CANYON RD SUITE 1H SAN DIEGO, CA 92120		PC	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				415,368

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>				
INTERPLAY6777 SURREYWOOD LANE BETHESDA, MD 20817		PC	CHARITABLE CONTRIBUTION	500
DANA FARBER CANCER INSTITUTE 450 BROOKLINE AVENUE BOSTON, MA 02215		PC	CHARITABLE CONTRIBUTION	30,000
JFGH CHARLES & MARGARET LEVIN HOUSE 1500 EAST JEFFERSON ST ROCKVILLE, MD 20852		PC	CHARITABLE CONTRIBUTION	35,000
Total ▶ 3a				415,368

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>				
DC YOUTH ORCHESTRA 7010 PINEY BRANCH ROAD WASHINGTON, DC 20012		PC	CHARITABLE CONTRIBUTION	1,000
JOHNS HOPKINS UNIVERSITY (KIMMEL) 750 E PRATT ST 17TH FL BALTIMORE, MD 21202		PC	CHARITABLE CONTRIBUTION	25,000
KENSINGTON VFDPO BOX 222 KENSINGTON, MD 20895		PC	CHARITABLE CONTRIBUTION	500
Total ▶ 3a				415,368

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>				
KIDS OF COURAGE 445 CENTRAL AVE SUITE 216 CEDARHURST, NY 11516		PC	CHARITABLE CONTRIBUTION	200
LUNG CANCER ALLIANCE 1700 K SREET NW 660 WASHINGTON, DC 20006		PC	CHARITABLE CONTRIBUTION	3,000
MARINE TOYS FOR TOTS 18251 QUANTICO GATEWAY DR TRIANGLE, VA 22172		PC	CHARITABLE CONTRIBUTION	250
Total ▶ 3a				415,368

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>				
MARYLAND THERAPEUTIC RIDING 1141 SUNRISE BEACH RD CROWNSVILLE, MD 21032		PC	CHARITABLE CONTRIBUTION	500
MD ANDERSON CANCER CARE CENTER PO BOX 301439 UNIT 705 HOUSTON, TX 77230		PC	CHARITABLE CONTRIBUTION	55,000
MEMORIAL SLOANE KETTERING 633 THIRD AVENUE NEW YORK, NY 10017		PC	CHARITABLE CONTRIBUTION	3,800
Total ▶ 3a				415,368

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>				
MOBILE MED 9309 OLD GEORGETOWN RD BETHESDA, MD 20814		PC	CHARITABLE CONTRIBUTION	1,000
NATIONAL BRAIN TUMOR SOCITY 55 CHAPEL STREET SUITE 200 NEWTON, MA 02458		PC	CHARITABLE CONTRIBUTION	1,000
NAT'L PHILHARMONIC 5301 TUCKERMAN LANE NORTH BETHESDA, MD 20852		PC	CHARITABLE CONTRIBUTION	2,070
Total ▶ 3a				415,368

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>				
NEADSPO BOX 1100 PRINCETON, MA 01541		PC	CHARITABLE CONTRIBUTION	1,000
DIRECT RELIEF 6100 WALLACE BECKNELL RD SANTA BARBARA, CA 93117		PC	CHARITABLE CONTRIBUTION	1,000
EDUCATION THROUGH MUSIC PO BOX 4274 STOCKTON, CA 95204		PC	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				415,368

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				
PARKINSON FOUNDATION 7700 LEESBURG PIKE 208 FALLS CHURCH, VA 22043		PC	CHARITABLE CONTRIBUTION	1,000
PEABODY INSTITUTE 1 E MOUNT VERNON PLACE BALTIMORE, MD 21202		PC	CHARITABLE CONTRIBUTION	12,000
PUPPIES BEHIND BARS 263 WEST 38TH STREET 4TH FLOOR NEW YORK, NY 10018		PC	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				415,368

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				
SAVE A CHILD'S HEART 2 SADDLEBROOK COURT SILVER SPRING, MD 20902		PC	CHARITABLE CONTRIBUTION	1,000
EVERYBODY WINS DC 1420 NEW YORK AVE NW 650 WASHINGTON, DC 20005		PC	CHARITABLE CONTRIBUTION	2,000
FRIENDSHIP PLACE 4713 WISCONSIN AVE NW WASHINGTON, DC 20016		PC	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				415,368

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>				
SPECIAL OLYMPICS 3701 COMMERCE DR 103 BALTIMORE, MD 21227		PC	CHARITABLE CONTRIBUTION	250
ST JUDES501 ST JUDE PLACE MEMPHIS, TN 38105		PC	CHARITABLE CONTRIBUTION	500
SULAM10600 MEADOW HILL RD SILVER SPRING, MD 20901		PC	CHARITABLE CONTRIBUTION	100
Total ▶ 3a				415,368

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>				
GILCHRIST HOSPICE 11311 MCCORMICK ROAD 350 HUNT VALLEY, MD 21031		PC	CHARITABLE CONTRIBUTION	180
U OF QUEENSLAND - PARKINSONS RESEARCH 805 15TH ST NW SUITE 610 WASHINGTON, DC 20005		PC	CHARITABLE CONTRIBUTION	10,000
WATER MISSIONPO BOX 71489 N CHARLESTON, SC 29415		PC	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				415,368

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>				
WHEATON RESCUE 2400 ARCOLA AVENUE WHEATON, MD 20902		PC	CHARITABLE CONTRIBUTION	750
WILMER EYE INSTITUTE 600 NORTH WOLFE ST BALTIMORE, MD 21287		PC	CHARITABLE CONTRIBUTION	500
HABITAT FOR HUMANITY 420 S 1ST STREET MILWAUKEE, WI 53204		PC	CHARITABLE CONTRIBUTION	500
Total ▶ 3a				415,368

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>				
HOLY CROSS HEALTH FOUNDATION 1481 BALDWIN STREET JENISON, MI 49428		PC	CHARITABLE CONTRIBUTION	7,500
HOUSING INITIATIVE PARTNERSHIP 6525 BELCREST RD 555 HYATTSVILLE, MD 20782		PC	CHARITABLE CONTRIBUTION	2,000
INTERNATIONAL RESCUE COMMITTEE 122 EAST 42ND STREET NEW YORK, NY 10168		PC	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				415,368

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>				
JEWISH COUNCIL FOR THE AGING 12320 PARKLAWN DRIVE ROCKVILLE, MD 20852		PC	CHARITABLE CONTRIBUTION	180
JOSEPH'S HOUSE 1730 LANIER PLACE NW WASHINGTON, DC 20009		PC	CHARITABLE CONTRIBUTION	3,000
LUTSGARTEN FOUNDATION FOR PANCREATIC 415 CROSSWAYS PARK DRIVE SUITE D WOODBURY, NJ 11797		PC	CHARITABLE CONTRIBUTION	16,000
Total ▶ 3a				415,368

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>				
MAP INTERNATIONAL 4700 GLYCO PARKWAY BRUNSWICK, GA 31525		PC	CHARITABLE CONTRIBUTION	1,000
MAYO CLINIC13400 E SHEA BLVD SCOTTSDALE, AZ 85259		PC	CHARITABLE CONTRIBUTION	15,000
MCPS EDUCATION FOUNDATION 850 HUNDERFORD DRIVE ROOM 149 ROCKVILLE, MD 20850		PC	CHARITABLE CONTRIBUTION	36,000
Total ▶ 3a				415,368

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>				
MICHAEL J FOX FOUNDATION PO BOX 4777 NEW YORK, NY 10163		PC	CHARITABLE CONTRIBUTION	1,000
MUSICIANSHIP INC 1704 GAINESVILLE STREET SE WASHINGTON, DC 20020		PC	CHARITABLE CONTRIBUTION	5,000
NATIONAL CENTER FOR CHILDREN & FAMILIES 1438 RHODE ISLAND AVE NE WASHINGTON, DC 20018		PC	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				415,368

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				
NATIONAL COWGIRL MUSEUM 1720 GENDY STREET FORT WORTH, TX 76107		PC	CHARITABLE CONTRIBUTION	5,000
OPERATION SECOND CHANCE 20251 CENTURY BLVD GERMANTOWN, MD 20874		PC	CHARITABLE CONTRIBUTION	1,000
OXEN HILL HIGH SCHOOL 6701 LEYTE DR OXON HILL, MD 20745		PC	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				415,368

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>				
PRESIDENT LINCOLNS COTTAGE AT THE SOLDIERS HOME 140 ROCK CREEK CHURCH RD NW WASHINGTON, DC 20011		PC	CHARITABLE CONTRIBUTION	500
PENFAULKNER FOUNDATION 641 S STREET NW 3RD FLOOR WASHINGTON, DC 20001		PC	CHARITABLE CONTRIBUTION	2,000
PROJECT HERA 3288 ADAMS AVE SUITE 16527 SAN DIEGO, CA 92176		PC	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				415,368

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				
PURPLE STRIDE 1500 ROSECRANS AVE SUITE 200 MANHATTAN BEACH, CA 90266		PC	CHARITABLE CONTRIBUTION	100
REDWOOD EMPIRE FOODBANK 3990 BRICKWAY BLVD SANTA ROSA, CA 95403		PC	CHARITABLE CONTRIBUTION	1,000
SCRIPPS RESEARCH 10550 NORTH TORREY PINES ROAD LA JOLLA, CA 92037		PC	CHARITABLE CONTRIBUTION	2,000
Total ▶ 3a				415,368

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>				
SIDNEY KIMMEL CANCER CENTER 5505 HOPKINS BAYVIEW CIRCLE BALTIMORE, MD 21224		PC	CHARITABLE CONTRIBUTION	3,500
SILVER SPRING VILLAGEPO BOX 8217 SILVER SPRING, MD 20907		PC	CHARITABLE CONTRIBUTION	3,000
SILGO MIDDLE SCHOOL 1401 DENNIS AVE SILVER SPRING, MD 20902		PC	CHARITABLE CONTRIBUTION	1,000
Total ▶ 3a				415,368

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>				
SOME71 O STREET NW WASHINGTON, DC 20001		PC	CHARITABLE CONTRIBUTION	2,000
STRATHMORE5301 TUCKERMAN LANE NORTH BETHESDA, MD 20852		PC	CHARITABLE CONTRIBUTION	1,000
SUSAN G KOMEN13770 NOEL ROAD DALLAS, TX 75380		PC	CHARITABLE CONTRIBUTION	500
Total ▶ 3a				415,368

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>				
SWALIGA - STEAM EDUCATION PROGRAMS 400 MASSACHUSETTS AVE NW WASHINGTON, DC 20001		PC	CHARITABLE CONTRIBUTION	500
THE DWELLING PLACE 19632 CLUB HOUSE RD SUITE 510 MONTGOMERY VILLAGE, MD 20886		PC	CHARITABLE CONTRIBUTION	2,000
THOMAS JOHNSON ELEMENTARY SCHOOL 100 E HEATH STREET BALTIMORE, MD 21230		PC	CHARITABLE CONTRIBUTION	3,000
Total ▶ 3a				415,368

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>				
WASHINGTON JAZZ ART INSTITUTE 1409 DELAFIELD PL NW WASHINGTON, DC 20011		PC	CHARITABLE CONTRIBUTION	1,800
US HOLOCAUST MUSEUM 100 RAOUL WALLENBURG PL SW WASHINGTON, DC 20024		PC	CHARITABLE CONTRIBUTION	180
VANDERBILT UNIVERSITY MEDICAL CENTER 1211 MEDICAL CENTER DRIVE NASHVILLE, TN 37232		PC	CHARITABLE CONTRIBUTION	180
Total ▶ 3a				415,368

TY 2019 Accounting Fees Schedule

Name: THE CHARLES AND MARGARET LEVIN
FAMILY FOUNDATION INC

EIN: 52-1917299

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING FEES	7,500	3,750		3,750

TY 2019 Investments Corporate Stock Schedule

Name: THE CHARLES AND MARGARET LEVIN
FAMILY FOUNDATION INC

EIN: 52-1917299

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
MORGAN STANLEY	6,795,137	7,488,855
MORGAN STANLEY	646,293	1,045,324

TY 2019 Other Increases Schedule

Name: THE CHARLES AND MARGARET LEVIN
FAMILY FOUNDATION INC

EIN: 52-1917299

Description	Amount
ADJUSTMENT TO FUND BALANCE DUE TO TIMING DIFFERENCES IN INVESTMENT REVENUE	224

TY 2019 Other Liabilities Schedule

Name: THE CHARLES AND MARGARET LEVIN
FAMILY FOUNDATION INC

EIN: 52-1917299

Description	Beginning of Year - Book Value	End of Year - Book Value
OVERDRAFT	224	0

TY 2019 Other Professional Fees Schedule

Name: THE CHARLES AND MARGARET LEVIN
FAMILY FOUNDATION INC

EIN: 52-1917299

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT FEES	76,323	76,323		0

TY 2019 Taxes Schedule

Name: THE CHARLES AND MARGARET LEVIN
FAMILY FOUNDATION INC

EIN: 52-1917299

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FOREIGN TAX	11,454	11,454		0
FED INCOME TAX	4,790	0		0