

For calendar year 2020, or tax year beginning 01-01-2020, and ending 12-31-2020

Name of foundation Lebovitz Family Charitable Trust		A Employer identification number 62-6247365	
Number and street (or P.O. box number if mail is not delivered to street address) 2030 Hamilton Place Blvd Suite 50		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code Chattanooga, TN 37421		B Telephone number (see instructions) (423) 490-8223	
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ Name change		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 ☐	
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) ▶ \$ 7,111,523		J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions).)		(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	15	15		
	4 Dividends and interest from securities	123,685	123,685		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10 _____	-147,587			
	b Gross sales price for all assets on line 6a _____				
	7 Capital gain net income (from Part IV, line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances _____				
Operating and Administrative Expenses	b Less: Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	-23,887	123,700		
	13 Compensation of officers, directors, trustees, etc.	0	0		0
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach schedule)	13,041	0		13,041
	c Other professional fees (attach schedule)	22,265	0		0
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	3,978	1,578		0
	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	39,284	1,578		13,041
	25 Contributions, gifts, grants paid	258,000			258,000
	26 Total expenses and disbursements. Add lines 24 and 25	297,284	1,578		271,041
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	-321,171			
	b Net investment income (if negative, enter -0-)		122,122		
c Adjusted net income (if negative, enter -0-)					

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	58,315	64,850	64,850
	2 Savings and temporary cash investments	499,426	82,200	82,200
	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)	3,070,100	3,163,168	4,723,915
	c Investments—corporate bonds (attach schedule)	284,264	459,537	487,772
	11 Investments—land, buildings, and equipment: basis ▶ _____ Less: accumulated depreciation (attach schedule) ▶ _____			
	12 Investments—mortgage loans			
	13 Investments—other (attach schedule)	1,814,389	1,627,263	1,752,786
	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)	5,726,494	5,397,018	7,111,523	
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 ▶ _____)			
	23 Total liabilities (add lines 17 through 22)	0	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	2,690,711	2,690,711	
	28 Retained earnings, accumulated income, endowment, or other funds	3,035,783	2,706,307	
29 Total net assets or fund balances (see instructions)	5,726,494	5,397,018		
30 Total liabilities and net assets/fund balances (see instructions) .	5,726,494	5,397,018		

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	5,726,494
2 Enter amount from Part I, line 27a	2	-321,171
3 Other increases not included in line 2 (itemize) ▶ _____	3	0
4 Add lines 1, 2, and 3	4	5,405,323
5 Decreases not included in line 2 (itemize) ▶ _____	5	8,305
6 Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 29 .	6	5,397,018

(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 Charles Schwab x0240	P		
b Charles Schwab x0240	P		
c Charles Schwab x0240	P		
d Charles Schwab x0240	P		
e Capital Gains Dividends	P		

(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 299,291		360,824	-61,533
b 1,558,233		1,748,092	-189,859
c 185,855		97,874	87,981
d 11		9	2
e 15,822			15,822

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69

(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	Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col.(h))
a			-61,533
b			-189,859
c			87,981
d			2
e			15,822

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	-147,587
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**

SECTION 4940(e) REPEALED ON DECEMBER 20, 2019 - DO NOT COMPLETE

1 Reserved

(a)	(b)	(c)	(d)
Reserved	Reserved	Reserved	Reserved

2	Reserved	
3	Reserved	
4	Reserved	
5	Reserved	
6	Reserved	
7	Reserved	
8	Reserved	

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	Reserved.	1	1,697
c	All other domestic foundations enter 1.39% 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	1,697
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	1,697
6	Credits/Payments:		
a	2020 estimated tax payments and 2019 overpayment credited to 2020	6a	5,739
b	Exempt foreign organizations—tax withheld at source	6b	0
c	Tax paid with application for extension of time to file (Form 8868)	6c	0
d	Backup withholding erroneously withheld	6d	0
7	Total credits and payments. Add lines 6a through 6d.	7	5,739
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.	8	0
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	4,042
11	Enter the amount of line 10 to be: Credited to 2021 estimated tax 4,042 Refunded	11	0

Part VII-A Statements Regarding Activities

1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		Yes	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. (2) On foundation managers.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers.			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? <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		
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) ▶ _____			
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 2020 or the taxable year beginning in 2020? See the 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 ▶ <u>N/A</u>	13		No
14	The books are in care of ▶ <u>CHARLES B LEBOVITZ</u> Telephone no. ▶ <u>(423) 490-8223</u>			

Located at ▶ 2030 HAMILTON PLACE BLVD CHATTANOOGA TNZIP+4 ▶ 37421

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 2020, 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	
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 2020?	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 2020, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2020? ☐ 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 2020 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 2020.)	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 2020?	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:		Yes	No
(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		
	<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?	☐ Yes ☒ No	6b	No
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			
	<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?	☐ Yes ☒ No	7b	
b	If "Yes", did the foundation receive any proceeds or have any net income attributable to the transaction?			
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
See Additional Data Table				
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 N/A	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	6,098,288
b	Average of monthly cash balances.	1b	451,366
c	Fair market value of all other assets (see instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	6,549,654
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	6,549,654
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	98,245
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	6,451,409
6	Minimum investment return. Enter 5% of line 5.	6	322,570

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	322,570
2a	Tax on investment income for 2020 from Part VI, line 5.	2a	1,697
b	Income tax for 2020. (This does not include the tax from Part VI.).	2b	
c	Add lines 2a and 2b.	2c	1,697
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	320,873
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	320,873
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	320,873

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	271,041
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	271,041
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	271,041

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 2019	(c) 2019	(d) 2020
1 Distributable amount for 2020 from Part XI, line 7				320,873
2 Undistributed income, if any, as of the end of 2020:				
a Enter amount for 2019 only.			0	
b Total for prior years: 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2020:				
a From 2015.	10,936			
b From 2016.	33,618			
c From 2017.	16,259			
d From 2018.				
e From 2019.				
f Total of lines 3a through e.	60,813			
4 Qualifying distributions for 2020 from Part XII, line 4: ► \$ 271,041				
a Applied to 2019, but not more than line 2a			0	
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 2020 distributable amount.				271,041
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2020. (If an amount appears in column (d), the same amount must be shown in column (a).)	49,832			49,832
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	10,981			
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 2019. Subtract line 4a from line 2a. Taxable amount—see instructions.			0	
f Undistributed income for 2021. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020.				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).	0			
8 Excess distributions carryover from 2015 not applied on line 5 or line 7 (see instructions).	0			
9 Excess distributions carryover to 2021. Subtract lines 7 and 8 from line 6a.	10,981			
10 Analysis of line 9:				
a Excess from 2016.				
b Excess from 2017.	10,981			
c Excess from 2018.				
d Excess from 2019.				
e Excess from 2020.				

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 2020, 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)

	Tax year	Prior 3 years			(e) Total
	(a) 2020	(b) 2019	(c) 2018	(d) 2017	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

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

Part XV

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).)

CHARLES B LEBOVITZ

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 e-mail address of the person to whom applications should be addressed:

CHARLES B LEBOVITZ
2030 HAMILTON PLACE BLVD
CHATTANOOGA, TN 37421
(423) 855-0001

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

A LETTER SHOULD BE SUBMITTED OUTLINING THE NEED FOR FUNDS

c Any submission deadlines:

N/A

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

N/A

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	258,000
b <i>Approved for future payment</i>				
Total			▶ 3b	0

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	15	
4 Dividends and interest from securities.			14	123,685	
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			14	15,822	-163,409
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). . .		0		139,522	-163,409
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations.)			13		-23,887

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

[illegible]

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) (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.				

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) (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.		
	*****	2021-07-29	*****
	_____ Signature of officer or trustee	_____ Date	_____ Title

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

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed ☐	PTIN
	Kim Huskey CPA		2021-07-29		P00958962
	Firm's name ▶ Henderson Hutcherson & McCullough PLLC				Firm's EIN ▶ 62-1114363
	Firm's address ▶ 1200 Market Street Chattanooga, TN 37402				Phone no. (423) 756-7771

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(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
CHARLES B LEBOVITZ	TRUSTEE 0.00	0	0	0
2030 HAMILTON PLACE BLVD CHATTANOOGA, TN 37421				
FAYE L PETERKEN	TRUSTEE 0.00	0	0	0
2950 MOUNT WILKINSON PARKWAY 1101 ATLANTA, GA 30339				
ALAN CATES	TRUSTEE 0.00	0	0	0
736 GEORGIA AVENUE SUITE 300 CHATTANOOGA, TN 37402				
STEPHEN LEBOVITZ	TRUSTEE 0.00	0	0	0
2030 HAMILTON PLACE BLVD CHATTANOOGA, TN 37421				
MICHAEL LEBOVITZ	TRUSTEE 0.00	0	0	0
2030 HAMILTON PLACE BLVD CHATTANOOGA, TN 37421				
ALAN LEBOVITZ	TRUSTEE 0.00	0	0	0
2030 HAMILTON PLACE BLVD CHATTANOOGA, TN 37421				
BETH LEBOVITZ BACKER	TRUSTEE 0.00	0	0	0
2030 HAMILTON PLACE BLVD CHATTANOOGA, TN 37421				

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>				
ALD Connect35 Village Road Middleton, MA 01949			To support a public charity	1,250
Alzheimer's Association - Mid South Chapter 7625 Hamilton Park Dr Suite 6 Chattanooga, TN 37421			To support a public charity	500
American Cancer Society 250 Williams Street NW Atlanta, GA 30303			To support a public charity	250
Total ▶ 3a				258,000

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>				
B'nai Zion Congregation 114 McBrien Road Chattanooga, TN 37411			To support a religious organization	500
Anti-Defamation League 3490 Piedmont Road NE 610 Atlanta, GA 30305			To support a public charity	500
Atlanta Community Food Bank 732 Joseph E Lowery Blvd NW Atlanta, GA 303186658			To support a public charity	1,000
Total ▶ 3a				258,000

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>				
Camp Ramah Darom 6400 Powers Ferry Road NW Suite 215 Atlanta, GA 30339			Educational and cultural	28,000
Chattanooga-Hamilton County Public Education 100 E 10th Street Suite 500 Chattanooga, TN 37402			Educational & cultural	3,000
Combined Jewish Philanthropies Kraft Family Bldg 126 High St Boston, MA 02110			To provide financial & social services	1,750
Total ▶ 3a				258,000

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>				
Community Assistance Center 1130 Hightower Trl Atlanta, GA 303502910			To support a public charity	500
Congregation OR Atid 10625 Patterson Avenue Henrico, VA 23238			To support a religious organization	1,000
Chattanooga Community Kitchen PO Box 11203 Chattanooga, TN 37401			To support a public charity	250
Total ▶ 3a				258,000

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>				
Chattanooga Area Food Bank 2009 Curtain Pole Road Chattanooga, TN 37406			To support a public charity	500
Food Bank of Central Eastern North Carolina 1924 Capital Blvd Raleigh, NC 27604			To support a public charity	250
Facing History and Ourselves 16 Hurd Road Memphis, TN 02445			To support the expansion of Facing History in Hamilton County, Tennessee	2,750
Total ▶ 3a				258,000

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>				
Greater Chicago Food Depository 4100 W Ann Lurie Pl Chicago, IL 60632			To support a public charity	250
Jewish Family & Children's Services of Greater Boston 1430 Main Street Waltham, MA 02451			To support the expansion of the Alzheimer's/Related Disorders Family Support Program	25,000
Jewish Federation of Greater Atlanta 1440 Spring Street NW Atlanta, GA 30309			To provide financial and social services	1,000
Total ▶ 3a				258,000

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 Federation of Greater Chattanooga 5461 North Terrace Road Chattanooga, TN 37411			To support annual campaign	150,000
Jewish Family & Children's Services 4747 North 7th Street Suite 100 Phoenix, AZ 85014			To support public charity	1,500
Maccabi USA 1511 Walnut Street Suite 401 Philadelphia, PA 19102			To support annual campaign	1,250
Total ▶ 3a				258,000

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>				
MUST MinistriesPO Box 1717 Marietta, GA 300611717			To support a religious organization	500
Ramah Darom Inc 6400 Powers Ferry Road NW Suite 215 Atlanta, GA 30339			To support a religious organization	4,500
Second Helpings AtlantaPO Box 720582 Atlanta, GA 30358			To support public charity	1,000
Total ▶ 3a				258,000

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 Community Center of Greater Boston Inc 333 Nahanton St Newton Center, MA 02459			To support a public charity	1,000
The Jewish Federations of North America Inc 25 Broadway Suite 1700 New York, NY 10004			To support a public charity	2,500
JF & CS Boston (Jewish Family & Children Services) 1430 Main Street Waltham, MA 02451			To support a religious organization	1,250
Total ► 3a				258,000

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>				
Temple Sinai Inc5645 Dupree Drive NW Atlanta, GA 30327			To support a religious organization	1,000
Tennessee AquariumPO Box 11048 Chattanooga, TN 37401			To support a public charity	750
Marietta High School Alumni & Friends Foundation 144 Polk Street Marietta, GA 30060			To support a public charity	500
Total ▶ 3a				258,000

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>				
United Way of Greater Chattanooga 630 Market Street Chattanooga, TN 37402			To support a public charity	15,000
Vanderbilt Hillel2421 Vanderbilt Pl Nashville, TN 37212			Educational and cultural	1,000
University of Texas Foundation 9011 Mountain Ridge Suite 150 Austin, TX 78759			To support a public charity	5,000
Total ▶ 3a				258,000

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>				
United States Holocaust Memorial Museum 100 Raoul Wallenberg Pl SW Washington, DC 20024			Educational & cultural	500
USA Cycling Foundation 210 USA Cycling Pt Ste 100 Colorado Springs, CO 80919			To support a public charity	2,500
Total ▶ 3a				258,000

TY 2020 Accounting Fees Schedule**Name:** Lebovitz Family Charitable Trust**EIN:** 62-6247365

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	13,041	0		13,041

TY 2020 Investments Corporate Bonds Schedule**Name:** Lebovitz Family Charitable Trust**EIN:** 62-6247365**Investments Corporate Bonds Schedule**

Name of Bond	End of Year Book Value	End of Year Fair Market Value
CVS HEALTH CORP	24,943	26,092
CITIGROUP, INC.	25,093	26,375
INVESCO BULLETSHARES 2023	50,969	54,750
INVESCO BULLETSHARES 2022	51,944	54,375
GENERAL ELECTRIC CAPITAL CORP 4.50%	31,088	32,896
ALLERGAN PLC 3.25%	24,655	26,009
INVESCO BULLETSHARES 2024	50,450	55,975
INVESCO BULLETSHARES 2025	50,250	56,575
INVESCO BULLETSHARES 2026	53,775	54,825
VANGUARD SHORT TERM CORP BOND	96,370	99,900

TY 2020 Investments Corporate Stock Schedule

Name: Lebovitz Family Charitable Trust
EIN: 62-6247365

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
AKRE FOCUS FUND INSTL	120,072	268,965
PEPSICO, INC.	11,329	17,796
APPLE, INC.	26,313	132,690
AT & T, INC.	47,236	40,264
BOEING COMPANY	13,097	21,406
CATERPILLAR, INC.	13,397	27,303
COCA COLA CO.	10,931	15,355
INTEL CORP.	4,969	9,964
JP MORGAN CHASE & CO.	27,237	50,828
MCDONALDS CORP	10,872	22,531
MERCK & CO, INC.	17,307	24,540
PFIZER, INC.	35,022	40,491
SOUTHERN CO.	13,772	18,429
STARBUCKS CORP.	15,137	32,094
LOCKHEED MARTIN CORP.	5,268	8,875
DFA US SMALL CAP PORTFOLIO INSTL	86,699	105,893
VANGUARD SMALL CAP	62,595	97,340
VANGUARD MID CAP	96,809	144,739
INVESCO QQQ TRUST	177,031	439,236
LOWES COMPANIES, INC.	15,533	32,102
WALT DISNEY CO.	14,384	27,177
WISDOM TREE EUROPE HEDGED EQUITY	53,441	66,300
SCHWAB FUNDAMENTAL INTL LARGE CO INDEX	177,384	204,960
EXXON MOBIL CORPORATION	20,208	14,427
CHEVRON CORP	38,159	33,780
ENTERGY CORP	14,958	19,968
DOMINION RESOURCES	21,520	22,560
CVS HEALTH CORP	24,161	17,075
MORGAN STANLEY DEP PFD A	84,373	99,800
GOLDMAN SACHS PFD D	62,145	75,720

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
GOLDMAN SACHS PFD A	39,984	49,160
BANK OF AMERICA PFD	88,330	99,960
MASTERCARD, INC.	13,561	53,541
VERIZON COMMUNICATIONS	14,106	17,625
CROWN CASTLE INTL CORP	21,079	39,798
INTERNATIONAL BUSINESS MACHINES	30,483	25,176
THERMO FISHER SCIENTIFIC, INC.	15,445	46,578
SPDR S & P BIOTECH	46,157	112,624
SANOFI	15,651	19,436
AMGEN, INC.	15,831	22,992
FIDELITY 500 INDEX FUND PREMIUM	235,695	407,254
GLOBAL X FDS GBAL XM LP	64,542	65,808
WILLIAMS COMPANIES	23,142	20,050
QUALCOMM, INC.	16,688	45,702
SCHWAB US MID CAP	49,320	68,180
SCHWAB US SMALL CAP	51,984	71,200
INVESCO S & P 500 EQUAL WEIGHT	257,124	382,620
NEXTERA ENERGY, INC.	15,148	30,860
TRUIST FINL CORP PFD	45,951	51,580
METLIFE, INC. PFD. A	48,001	51,300
AMAZON.COM INC	45,476	81,423
ALIBABA GROUP HOLDING LTD	17,543	23,273
BERKSHIRE HATHAWAY CI B	28,807	34,781
SPLUNK INC	22,390	33,978
FACEBOOK INC	24,801	34,145
BRISTOL-MEYERS SQUIBB COMPANY	33,028	37,218
ALPHABET INC CLASS A	16,944	26,290
ANTHEM INC	16,748	24,082
BROADCOM INC	11,878	21,893
DUKE ENERGY CORP	25,351	27,468

Investments Corporation Stock Schedule

Name of Stock	End of Year Book Value	End of Year Fair Market Value
GOLDMAN SACHS GQG PTRS INTERNATIONAL OPPORTUNITY FUND	250,473	270,490
HONEYWELL INTERNATIONAL	14,323	21,270
VANGUARD INTERNATIONAL GROWTH FUND ADMIRAL	205,772	247,951
RAYTHEON TECHNOLOGIES CORP	20,053	25,601

TY 2020 Investments - Other Schedule

Name: Lebovitz Family Charitable Trust

EIN: 62-6247365

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
VAN ECK INTL INVESTORS GOLD FD Y	AT COST	161,725	270,150
PRUDENTIAL FLOATING RATE	AT COST	109,589	107,107
PIMCO INCOME A	AT COST	115,422	113,730
BBH LIMITED DURATION	AT COST	153,856	155,656
OSTERWEIS STRATEGIC INCOME	AT COST	110,443	120,138
LAZARD GLOBAL LISTED INFRASTRUCTURE INSTL	AT COST	77,464	76,356
BLACKROCK EVENT DRIVEN EQUITY	AT COST	99,364	104,172
AGF INVTS TR AGFIQ US MK ANTI	AT COST	48,660	38,160
ASTOR MACRO ALTERNATIVE I	AT COST	76,461	78,551
BLACKROCK SYSTEMATIC MULTI-STRATEGY	AT COST	75,468	73,997
ISHARES CORE 1-5 YEAR USD BOND ETF	AT COST	153,510	154,920
JP MORGAN HEDGED EQUITY I	AT COST	100,585	104,957
PIMCO ENHANCED SHORT MATURITY	AT COST	101,674	102,040
PIMCO TOTAL RETURN ACTIVE ETF	AT COST	111,490	113,110
SCHWAB US DIVIDEND EQUITY	AT COST	56,086	64,140
T.ROWE PRICE ULTRA SHORT-TERM BOND I	AT COST	75,466	75,602

TY 2020 Other Decreases Schedule

Name: Lebovitz Family Charitable Trust

EIN: 62-6247365

Description	Amount
NON-TAXABLE DISTRIBUTIONS	8,305

TY 2020 Other Professional Fees Schedule**Name:** Lebovitz Family Charitable Trust**EIN:** 62-6247365

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
INVESTMENT ADVISORY SERVICES	22,265	0		0

TY 2020 Taxes Schedule

Name: Lebovitz Family Charitable Trust
EIN: 62-6247365

Taxes Schedule

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAXES	3,978	1,578		0