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sorm 990-PF

Department of the Treasury Internal Revenue Service **Return of Private Foundation**

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

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0052

2008

For ¢	aleni	far year 2008, or tax year beginning		, and ei	naing				
G C	heck	all that apply Initial return	Final return X A	mended retu	ım X	Address	change	Name cha	nge
ilse	the i	Name of foundation			'	A Employ	yer identification	number	
	ibel.					,			
	erwis	e, IACOCCA FAMILY FOUNDA	TION			38-	<u>-6071154</u>		
1	rint	Number and street (or P O box number if mail is not de	livered to street address)		Room/suite	B Teleph	one number		
	type	DO / DOIDDION DINDEI/	6TH FLOOR			61	<u>7–267–77</u>	47	
See						C If exemp	otion application is p	ending, check here	ightharpoonup
instr	ucliu	BOSTON, MA 02116				D 1. Fore	eign organizations	, check here	ightharpoons
H C	heck	type of organization X Section 501(c)(3) ex	empt private foundation			2. Fore	ign organizations me k here and attach co	eting the 85% test, moutation	▶ □
	-		Other taxable private founda	tion					
I Fa		rket value of all assets at end of year J Accounting	ng method Cash	X Accr	ual		section 507(b)(1)	tus was terminated (A), check here	▶ □
		· 1	her (specify)					60-month terminati	00
•		33,218,903. (Part I, colu		asis.)			section 507(b)(1)		
Pa	rt I	Analysis of Revenue and Expenses	(a) Revenue and		vestment	(c) /	Adjusted net	(d) Disburseme	ents
1	2.A.A.	(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a)	expenses per books		ome		income	for charitable purp (cash basis on	
	1	Contributions, gifts, grants, etc., received	296,294.				N/A	······	
		Check If the foundation is not required to attach Sch B							
	3	Interest on savings and temporary cash investments							***********
	Δ	Dividends and Interest from securities	1,765,513.	1.76	0,801.			STATEMEN	r 2
	•	Gross rents	2,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,		• , • • • •		·····		
		Net rental income or (loss)							
	_	Net gain or (loss) from sale of assets not on line 10	<55,979.	>			······································	STATEMEN	F 1
<u>n</u>	Va h	Gross sales price for all 5 348 635	133/31/31		***************************************		DECE	MED	
Revenue	7	assets on line 6a Capital gain net income (from Part IV, line 2)			0.		REVE	1 (177)	
æ	_	•						<i>d</i>	
	8	Net short-term capital gain			**********	32	SEP 2	7 2010 Q	}
		Income modifications Gross sales less returns				0	01	- C	
	10a	and allowances			·····		CONT	E) (IT	
		Less Cost of goods sold				 -	- UUUE	 	}
		Gross profit or (loss)			-	 		MIHABA (400)	
	11	Other income Tatal. Add lines 1 through 11	2,005,828.	1.76	0,801.	 			
_	12		272,500.		6,250.			136,	250
	13	Compensation of officers, directors, trustees, etc	100,709.		3,125.				584.
	14	Other employee salaries and wages Pension plans, employee benefits	66,665.		0,643.				087.
æ	15		43,335.		6,500.				835.
xpenses	ı	amar 4	11,025.		1,654.				371.
×	I	71000difting 1000	118,312.		6,583.				630.
ш	I	Other professional fees DITI 3	110/3120		· • • • • • • • • • • • • • • • • • • •	'	· · · · · ·	13,	550.
ativ.	17 18	Taxes STMT 6	62,494.		7,895.			10	599.
Operating and Administrative	1	Taxes STMT 6 Depreciation and depletion	4,642.		0.			1	<u> </u>
Ē	19		57,238.		8,586.		-	18	652.
Ę	20	Occupancy Travel conferences and meetings	44,584.	2	2,292			20,	292.
Þ	21	Travel, conferences, and meetings	12,072.		1,811.			10	$\frac{292.}{261.}$
Jar	22	Printing and publications Other expenses STMT 7	73,374.	1	1,006				368.
ting	23		13/3/4		1,000	1		021	550.
era	4	Total operating and administrative	866,950.	2.0	36,345			516,	929
Ö	05	expenses. Add lines 13 through 23	4,924,816.		0,040	'	· · · · · · · · · · · · · · · · · · ·	3,395,	540
		Contributions, grifts, grants paid	4/254/010.			 		3,393,	J T J •
	20	Total expenses and disbursements.	5,791,766.	20	36,345.			3,912,	47Ω
	-	Add lines 24 and 25	3,131,100.		,0,343	' 		3,314,	7/0.
	1	Subtract line 26 from line 12.	<3,785,938.	<u>,</u>					
		Excess of revenue over expenses and disbursements	\J, 10J, 730.		74,456			-	·····
	1	Net investment income (if negative, enter -0-)		1,4	4,420		N/A	 	·····
_	1 0	Adjusted net income (if negative, enter -0-)	<u>L </u>	l		.1	11/14	50 000 PI	

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions.

Form **990-PF** (200

Part # Analysis of Changes in Net Assets or Fund Balances

31 Total liabilities and net assets/fund balances

1 Total net assets or fund balan	ces at beginning of year - Part II, column (a), line 30		
(must agree with end-of-year	figure reported on prior year's return)	1	50,275,176.
2 Enter amount from Part I, line	27a	2	<3,785,938.>
3 Other increases not included	n line 2 (itemize)	3	0.
4 Add lines 1, 2, and 3		4	46,489,238.
5 Decreases not included in line	2 (Itemize) ► UNREALIZED LOSS	5	15,305,537.
6 Total net assets or fund balan	ces at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	31,183,701.

50,775,176.

33,218,903

		rty sold (e.g., real estate, ock, 200 shs MLC Co)		(b) How acquire P - Purchase D - Donation	(m	ate acquired o , day, yr)	(d) Date sold (mo , day, yr)
a PIMCO				P		/28/04	01/03/08
SECURITIES				P	01,	/01/08	12/31/08
				·			
<u> </u>				 	+		
	(f) Depreciation a	lowed (a) Coe	ot or other have	- 		h) Coup or (loor	
(e) Gross sales price	(or allowable		st or other basis expense of sale			h) Gain or (los: plus (f) minus	
715,000.			1,392,162	2.			<677,162
4,633,635.			4,012,452				621,183
<u> </u>							
<u> </u>							
				<u> </u>			· · · · · · · · · · · · · · · · · · ·
Complete only for assets showing				_		is (Col. (h) gair but not less tha	
(i) F M V as of 12/31/69	(j) Adjusted ba as of 12/31/6		cess of col (1) col (1), if any			ses (from col	
			cor (j), ii airy	-	 		<677 162
]							<677,162 621,183
				- 			021,100
					_		
	∫ If ga	ın, also enter ın Part I, line	7	1			
Capital gain net income or (net cap	oital loss) 👤 If (Id	ın, also enter in Part I, line iss), enter -0- in Part I, line	7] 2	,		<55 , 979
Net short-term capital gain or (los	s) as defined in section	s 1222(5) and (6)					
If gain, also enter in Part I, line 8,	column (c).					37 / 7	
If (loss), enter -0- in Part I, line 8 Part V Qualification U	ndor Section 40	MO(a) for Bodyson	Toy on Not	J 3	t Incom	N/1	<i>y</i>
as the foundation liable for the sect "Yes," the foundation does not qual			· ·	od?			Yes X N
Enter the appropriate amount in e	ach column for each ye	ear, see instructions before	making any entries	S			
(a) Base period years	ā donaka d	(b)	N	(c)			(d) ibution ratio
Calendar year (or tax year beginnir	ig in) Adjusted (qualifying distributions	Net value of non			(col (b) d	vided by col (c))
2007		2,864,325.		50,829,			.05635
2006 2005		2,254,367. 2,386,322.		48,076, 40,909,			.04689
2003		2,583,763.		39,402,			.06557
2003		1,235,373.		37,074,			.03332
					1		
Total of line 1, column (d)						2	.26047
Average distribution ratio for the S	5-year base period - div	ide the total on line 2 by 5,	, or by the number (of years	1		
the foundation has been in exister	nce if less than 5 years				<u> </u>	3	.05209
Enter the net value of noncharitab	le-use assets for 2008	from Part X, line 5			_	4	11,882,815
Multiply line 4 by line 3						5	2,181,843
Enter 1% of net investment incom	ne (1% of Part I, line 27	b)				6	14,745
Add lines 5 and 6						7	2,196,588
Enter qualifying distributions from	n Part XII, line 4					8	3,962,606
	line 7, check the box i						

Part VI Excise Tax Based on Investment Income (Section 4940(b), 4940(b), or 4948 - see instructions) I sempt operating fountabons descread in school 4940(c), check here — and enter (*No* on her 1 Date of uning letter.				71154		Page 4
Date of nulng letter.			<u>48 - s</u>	ee instru	ctior	<u>15)</u>
b Domestic foundations that meet the section 4940(s) requirements in Part V, check here ► X and enter 1% of Part I, line 12D. 2 Tax under section 511 (domestic section 4947(a)(1) fluxist and taxable foundations only. Others enter -0-) 2 Tax under section 511 (domestic section 4947(a)(1) fluxist and taxable foundations only. Others enter -0-) 3 14,745. 3 14,745. 4 0.0. 5 Tax based on investment income in the size of	1a	Exempt operating foundations described in section 4940(d)(2), check here and enter "N/A" on line 1				
of Part I, line 27b 2 Tax under section 511 (comestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 And lines 1 and 2 3 And lines 1 and 2 3 And lines 1 and 2 5 Subtitle A (normality is section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based en investment income. Subtract line 4 from line 3 If zero or less, enter -0- 5 Tax based en investment income. Subtract line 4 from line 3 If zero or less, enter -0- 5 Tax based en investment income. Subtract line 4 from line 3 If zero or less, enter -0- 5 Tax based en investment income. Subtract line 4 from line 3 If zero or less, enter -0- 5 Tax based en investment income. Subtract line 4 from line 3 If zero or less, enter -0- 5 Tax based en investment income. Subtract line 4 from line 3 If zero or less, enter -0- 5 Tax based en investment income. Subtract line 4 from line 3 If zero or less, enter -0- 5 Tax based en investment income. Subtract line 4 from line 3 If zero or less, enter -0- 5 Tax based en investment income. Subtract line 4 from line 3 If zero or less, enter -0- 6 Be				_		
## All other domestic foundations enter 2% of the 27b Exempt foreign organizations enter 4% of Part I, line 12, cot (b) 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 Add lines 1 and 2 4 Subtite A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from tine 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from tine 3 if zero or less, enter -0- 6 Cendis/Payments 2 2008 estimated tax payments and 2007 overpayment credded to 2008 8 8 73,282. 8 8 73,282. 8 8 73,282. 8 8 73,282. 8 8 73,282. 9 8 8 73,282. 8 9 73,282. 9 9 73,282. 1 14,745. 1 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2 2	þ	Domestic foundations that meet the section 4940(e) requirements in Part V, check here 🕒 🔀 and enter 1%	1	1	4,7	<u>45.</u>
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 Add lines 1 and 2 4 Subtitle A (Income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 6 Be		of Part I, line 27b				
3 14,745. 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 5 Tax based on investment income. Subtract line 4 from line 3 if zero or less, enter -0- 6 Credis/Payments 2 2008 estimated tax payments and 2007 overpayment credied to 2008 8 73,282. 8 8 73,282. 8 8 73,282. 8 8 73,282. 8 8 73,282. 8 8 8 73,282. 8 8 8 73,282. 8 8 8 73,282. 8 8 8 73,282. 8 8 8 73,282. 8 8 8 73,282. 8 8 8 73,282. 8 8 8 8 73,282. 8 8 8 8 73,282. 8 8 8 8 73,282. 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8 8	C	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b) 💚				_
6 Credits/Payments a 2008 estimated tax payments and 2007 overpayment credded to 2008 beampt froeign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8866) beampt froeign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8866) beampt froeign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8866) beampt froeign organizations - tax withheld at source d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d Enter any penalty for underpayment of estimated tax Check here I of Form 2220 is attached 9 Tax des. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 12 During the tax year, did the foundation diversed the foundation attempt to influence by any abilitial state, or local legislation or did it participate or intervene in any political campaign? 12 During the tax year, did the foundation attempt to influence by or undirectly) for political purposes (see instructions for definition)? 13 During the tax year, did the foundation attempt the year (either directly or indirectly) for political purposes (see instructions for definition)? 14 If the answer is "See" to 1 at or 11, attach a detailed description of the activities and copies of any maternals published or distributed by the foundation in connection with the activities. 15 Use the foundation in part of the year? 16 If the situation of the foundation during the year for political expenditure tax imposed on foundation managers S S O. 2 Enter the memburssement (fam) of tax or political expenditure tax imposed on foundation managers S S O. 3 Enter the activities of the activit	2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2			<u>0.</u>
6 Credits/Payments a 2008 estimated tax payments and 2007 overpayment credded to 2008 beampt froeign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8866) beampt froeign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8866) beampt froeign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8866) beampt froeign organizations - tax withheld at source d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6a through 6d Enter any penalty for underpayment of estimated tax Check here I of Form 2220 is attached 9 Tax des. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 12 During the tax year, did the foundation diversed the foundation attempt to influence by any abilitial state, or local legislation or did it participate or intervene in any political campaign? 12 During the tax year, did the foundation attempt to influence by or undirectly) for political purposes (see instructions for definition)? 13 During the tax year, did the foundation attempt the year (either directly or indirectly) for political purposes (see instructions for definition)? 14 If the answer is "See" to 1 at or 11, attach a detailed description of the activities and copies of any maternals published or distributed by the foundation in connection with the activities. 15 Use the foundation in part of the year? 16 If the situation of the foundation during the year for political expenditure tax imposed on foundation managers S S O. 2 Enter the memburssement (fam) of tax or political expenditure tax imposed on foundation managers S S O. 3 Enter the activities of the activit	3	Add lines 1 and 2	3	1	4,7	<u>45.</u>
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a 2008 estimated tax payments and 2007 overpayment credited to 2008 b Exempt foreign organizations - tax withheld at source c Tax past with application for extension of time to file (Form 8868) d Backup withholding erroreously withheld T Total credits and payments. Add lines 6a through 60 Enter any penalty for underpayment of estimated tax. Check here	5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	1	4,7	<u>45.</u>
b Exempt foreign organizations - tax withheld at source c Tax paid with application for extension of time to file (Form 8868) d Backup withholding erroneously withheld 7 Total credits and payments. Add lines 6s through 6d 8 Enter any penality for underpayment of estimated tax Check here	6					
t Tax pard with application for extension of time to file (Form 8868) d Backup withholding erroneously withhold 8 Enter any genalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 8 Enter the amount of line 5 and 8 is more than the total of lines 5 and 8 is more than the total of lines 5 and 8, enter the amount overed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a 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? 1b did it speen dimore than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b X 1b the answer is "Yes" to 1a or 10, attach a detailed description of the activities. 1c Did the foundation line Form 1120-POL for this year? 1c Did the foundation in Form 1120-POL for this year? 1c As the foundation in Form 1120-POL for this year? 1c As the the reundation engaged in any activities that have not previously been reported to the IRS? 1c Yes, "attach a detailed description of the activities. 1d Has the foundation engaged in any activities that have not previously been reported to the IRS? 1d Yes, "attach a detailed description of the activities. 1d Yes, "attach the	а	2008 estimated tax payments and 2007 overpayment credited to 2008 6a 73, 282.				
d Backup withholding erroneously withheld 7 Total credits and preparents. Add lines 6 a through 6d 8 Enter any penalty for underpayment of estimated tax Check here	þ	Exempt foreign organizations - tax withheld at source				
7 Total credits and payments. Add lines 6a through 6d 8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 8 Enter the penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached 9 Tax due. If the total of lines 5 and 8 is more than the 10 and inex 7, enter amount owed 9 Toverpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owerpaid 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount owerpaid 11 Enter the amount of line 10 to be Credited to 2009 estimated lax ► 58,537. Refunded ► 11 0 . 58,537. 12 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? 12 Dut it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 13 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. 14 During the tax year, did the foundation in connection with the activities. 15 Did the foundation file Form 1120-P01 for this year? 26 Enter the remibursement (if any) of tax on political expenditures (section 4955) imposed during the year 27 (1) On the foundation magage in any activities that have not previously been reported to the IRS? 28 Enter the sumbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation nor burbard of the activities. 29 Lists the foundation have unrelated business gross income of \$1,000 or more during the year? 20 Lists the foundation have unrelated business gross income of \$1,000 or more during the year? 20 Lists the requirements of section 500(e) (relating to sections 4941 through 4945) satisfied either: 20 Lists the gislation that effectively amends the governing instrument so that no mandatory directions that conflict with the sta	C	Tax paid with application for extension of time to file (Form 8868)				
8 Enter any penalty for underpayment of estimated tax Check here	d	Backup withholding erroneously withheld 6d 6d				
18 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11			7	7	3,2	<u>82.</u>
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 11 Enter the amount of line 10 to be Creatited to 2009 setimated tax ▶ 58,537. Refunded ▶ 11 0.2 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? 1a During 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. 1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b X 1b X 1c Enter 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. 1c Did the foundation file Form 1120-PDL for this year? 1c Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year 1c) On the foundation ▶ \$ 0.2 2 Has the foundation ⇒ \$ 0.2 2 Has the foundation angaged in any activities that have not previously been reported to the IRS? 1f "Yes," attach a detailed description of the activities. 3 Has the foundation made any changes, not previously been reported to the IRS? 1f "Yes," attach are aliquidation, termination, of substantial contraction during the year? 2 b If "Yes," attach the statement required by General Instruction T. 3 Are the requirements of section 508(a) (relating to sections 4941 through 4945) satisfied either 2 by language in the governing instrument, or 2 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, or 2 by state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain	8	Enter any penalty for underpayment of estimated tax. Check here if Form 2220 is attached	8			
11 Enter the amount of line 10 to be Credited to 2009 estimated tax ▶ 58,537	9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed				
Part VII-A Statements Regarding Activities 1a Dung the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a Dung the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign? 1a Dung the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b Dung the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b Dung the year (either directly or indirectly) for political purposes (see instructions for definition)? 1c Dung the year (either directly or indirectly) for political purposes (see instructions for definition)? 1c Dung the year (either directly or indirectly) for political purposes (see instructions for definition)? 1c Dung the year (either directly or indirectly) for political purposes (see instructions for political purposes) (see instruction of the activities and copies of any materials published or distributed by the foundation with the activities. 1c Dung the year (either directly expenditures (section 4955) imposed during the year (either directly expenditures (section 4955) imposed during the year (either directly expenditures (section 4955) imposed during the year (either directly expenditures (section 4955) imposed during the year (either directly expenditures (section 4955) imposed during the year (either directly expenditures (either directly expenditures (section 4955) imposed during the year (either directly expenditures (either directly expenditures (section 4955) imposed during the year (either directly expenditures (either directly expenditures (section 4955) imposed during the year (either directly expenditures (ei		· · · · · · · · · · · · · · · · · · ·		5	8,5	
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 campaigin? b Did it spend more than \$100 during the year (either directly) or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities. c Did the foundation like Form 1120-PDL for this year? (1) On the foundation ▶ \$			11			<u>0.</u>
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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 mid-	eaning of	
section 512(b)(13)? If "Yes," attach schedule (see instructions)	11	<u> </u>
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before]
August 17, 2008?	12	<u> </u>
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption a	application? 13_	<u> </u>
Website address ► IACOCCAFOUNDATION.ORG	- 615 065 51	
14 The books are in care of ► THE FOUNDATION	Telephone no ►617-267-7	/4/
Located at \triangleright 867 BOYLSTON STREET, 6TH FLOOR, BOSTON,	MA ziP+4 ►02116	
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		/A
Part VII-B Statements Regarding Activities for Which Form 4720 May B		
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 X No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from)		
a disqualified person?	Yes X No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	Yes X No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	X 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 X No	
(6) Agree to pay money or property to a government official? (Exception. Check "No"		
if the foundation agreed to make a grant to or to employ the official for a period after		
termination of government service, if terminating within 90 days)	Yes X No	
b if any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Re	gulations	
section 53 4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions		X
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	at were not corrected	
before the first day of the tax year beginning in 2008?	1c	X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private	ate operating foundation	
defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII	i) for tax year(s) beginning	
before 2008?	Yes X No	
If "Yes," list the years 🕨,,,,,,,,,		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a		
valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listen		
statement - see instructions)	N/A 2b	ļ
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years her	re	
<u> </u>	<u></u>	
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time		
during the year?	Yes X No	
b if "Yes," did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation of	į ;	
May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under	1 11 11	
of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding pe		
Form 4720, to determine if the foundation had excess business holdings in 2008.)	N/A 3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable pu	F :	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopard	dize its charitable purpose that	

had not been removed from jeopardy before the first day of the tax year beginning in 2008?

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Part VII-B Statements Regarding Activities for Which F	orm 4720 May Be F	Required (contin	ued)		
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))?	Ye	s X No		
(2) Influence the outcome of any specific public election (see section 4955), or	r to carry on, directly or indire				
any voter registration drive?			s X No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?		Y6	s X No		
(4) Provide a grant to an organization other than a charitable, etc., organization	described in section		[1]		
509(a)(1), (2), or (3), or section 4940(d)(2)?			s X No		
(5) Provide for any purpose other than religious, charitable, scientific, literary,	or educational purposes, or f				
the prevention of cruelty to children or animals?			s X No		
b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify und		n Regulations	27/2	_	
section 53 4945 or in a current notice regarding disaster assistance (see instru	· ·		N/A	5b	
Organizations relying on a current notice regarding disaster assistance check h					
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption fr	om the tax because it maintai				
expenditure responsibility for the grant?		Ye	is L No		
If "Yes," attach the statement required by Regulations section 53.4945	• •				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to p	pay premiums on	П.,	[Te]		
a personal benefit contract?		Y6	s X No		ų.
b Did the foundation, during the year, pay premiums, directly or indirectly, on a p	ersonal benefit contract?		<u> </u>	6b	X
If you answered "Yes" to 6b, also file Form 8870.		,	[V]		
7a At any time during the tax year, was the foundation a party to a prohibited tax s		Y6	s X No		
b If yes, did the foundation receive any proceeds or have any net income attribute			N/A	7b	
Part VIII Information About Officers, Directors, Trusto	ees, roundation ma	inagers, riigni	<i>y</i>		
List all officers, directors, trustees, foundation managers and their	compensation.				
	(b) Title and average	(c) Compensation	(d) Contributions to	(e) E	xpense
(a) Name and address	hours per week devoted to position	(If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred	accou	int, other wances
	to position	enter -0-)	compensation	1 41101	rances
SEE STATEMENT 11		272,500.	33,705.		0.
		1		1	
2 Compensation of five highest-paid employees (other than those inc	luded on line 1). If none,	enter "NONE."			
4.1 Marro and address of analysis and anomalysis of the marrow of the mar	(b) Title, and average		(d) Contributions to employee benefit plans	(e) f	Expense
(a) Name and address of each employee paid more than \$50,000	hours per week devoted to position	(c) Compensation	and deferred compensation	accou	unt, other wances
NONE	•				
]	1	
			<u>i</u> _		
				T	
]				
Total number of other employees paid over \$50,000			>		0

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Part VIII Information About Officers, Directors, Trustees, Foundation Paid Employees, and Contractors (continued)	ation Managers, Highly		
3 Five highest-paid independent contractors for professional services. If none, enter			
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) C	compensation
NONE	(2) 1) po di dell'illa	(4)	- Inpolitocian
	_		
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 statis number of organizations and other beneficiaries served, conferences convened, research papers pro	stical information such as the	Exper	ıses
1 N/A			
2			-
3			
4			
D. ACC DIA			
Part IX-B Summary of Program-Related Investments Describe the two largest program-related investments made by the foundation during the tax year or	n lines 1 and 2	Amo	
1 N/A	Times Land 2	Affilo	ant
2			
All other program-related investments See instructions			
3			

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Total. Add lines 1 through 3

P	Minimum Investment Return (All domestic foundations mi	nust comp	olete this p	art. Foreign foui	ndations	, see instructions.)
1	Fair market value of assets not used (or held for use) directly in carrying out charitable	e, etc , pur	poses			
a	Average monthly fair market value of securities				1a	40,032,459.
b	Average of monthly cash balances				15	103,029.
£	Fair market value of all other assets				1¢	2,385,136.
d	Total (add lines 1a, b, and c)				1d	42,520,624.
8	Reduction claimed for blockage or other factors reported on lines 1a and					
		18		0.		
2	Acquisition indebtedness applicable to line 1 assets				2	0.
3	Subtract line 2 from line 1d				3	42,520,624.
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount,	, see instru	ctions)		4	637,809.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on		•		5	41,882,815.
6	Minimum investment return. Enter 5% of line 5	•			6	2,094,141.
P	art XI Distributable Amount (see instructions) (Section 4942(j)(3) and foreign organizations check here and do not complete this part)		ıvate operat	ing foundations ar	d certain	-
1	Minimum investment return from Part X, line 6				1	2,094,141.
2a	Tax on investment income for 2008 from Part VI, line 5	2a		14,745.		
b	Income tax for 2008 (This does not include the tax from Part VI)	2b		<u> </u>		
C	Add lines 2a and 2b	•			2c	14,745.
3	Distributable amount before adjustments Subtract line 2c from line 1				3	$\frac{14,745.}{2,079,396.}$
4	Recoveries of amounts treated as qualifying distributions				4	0.
5	Add lines 3 and 4				5	2,079,396.
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 3	XIII, line 1			7	2,079,396.
P	art XII Qualifying Distributions (see instructions)				······································	
1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purp	poses				
a					1a	3,912,478.
b	b Program-related investments - total from Part IX-B				1b	<u> </u>
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitab	ble, etc , pu	ırposes		2	50,128.
3	Amounts set aside for specific charitable projects that satisfy the					
а	Suitability test (prior IRS approval required)				3a	
þ	Cash distribution test (attach the required schedule)				3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, an	nd Part XIII	l, line 4		4	3,962,606.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investigations.	estment			<u> </u>	
	income Enter 1% of Part I, line 27b				5	14,745. 3,947,861.
6	Adjusted qualifying distributions. Subtract line 5 from line 4				6	3,947,861.
	Note. The amount on line 6 will be used in Part V, column (b), in subsequent years w	vhen calcul	ating wheth	er the foundation	qualifies f	or the section
	4940(e) reduction of tax in those years					

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Part XIII Undistributed Income (see instructions)

1 Destributable amount for 2008 from Part XI, Intel 17 2 (1 unanimated execute, if any, to of the east of 2007 at Enter amount for 2007 only) 1 Excess distributions carryover, if any, to 2008 a From 2004		(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
2. Undestroucher commerce of any, we of the end of 2007 B and the price of 2007 B Total for prior years: 3. Excess distributions carryover, if any, to 2008 a From 2004 663, 593, shrom 2005 417, 289 d From 2006 417, 289 d From 2007 407, 925 d From 2006 417, 289 d From 2007 1 From 2007 407, 925 d From 2006 417, 289 d From 2007 407, 925 d From 2006 417, 289 d From 2007 407, 925 d From 2006 417, 289 d From 2008 50 d From 2006 417, 289 d From 2006 41	1 Distributable amount for 2008 from Part XI,				
2. Undestroucher commerce of any, we of the end of 2007 B and the price of 2007 B Total for prior years: 3. Excess distributions carryover, if any, to 2008 a From 2004 663, 593, shrom 2005 417, 289 d From 2006 417, 289 d From 2007 407, 925 d From 2006 417, 289 d From 2007 1 From 2007 407, 925 d From 2006 417, 289 d From 2007 407, 925 d From 2006 417, 289 d From 2007 407, 925 d From 2006 417, 289 d From 2008 50 d From 2006 417, 289 d From 2006 41	line 7				2,079,396.
3 Excess distributions carryover, if any, to 2008 a From 2004 663, 593. e From 2004 417, 289. e From 2005 4170, 289. e From 2006 4170, 289. e From 2007 407, 925. e From 2006 407, 925. e From 2007 1 7 stal of lanes 3a through e 40 Aughlynd distributions for 2008 from Part XII, line 4 * 1 3, 3, 562, 606. a Applied to 2007, but not more than line 2 a Applied to undistributed income of prory years (Election required - see instructions) c Francisco of the Company of the C	2 Undistributed income, if any, as of the end of 2007				
3 Excess distributions carryover, if any, to 2008 a From 2004	a Enter amount for 2007 only			0.	
3 Excess distributions carryover, if any, to 2008 a From 2004 663,593. c From 2006 417,289. d From 2007 407,925. 1 Tratal of lines 34 through e 40 Charlying distributions for 2008 from Part XII, line 4 Ps. 3,962,606. a Applied to 2007. but not more than line 2 a Applied to 2007. but not more than line 2 a Applied to 2008 distributions out of corpus (Election required - see instructions) 1 Tratal as distributions out of corpus (Election required - see instructions) 4 Applied to 2008 distributions out of corpus (Election required - see instructions) 5 Tratal as distributions are reviewed applied to 2008 6 Remaining a mount distributed out of corpus (Election required - see instructions) 7 Tratal as distributions are reviewed applied to 2008 7 Tratal as distributions are reviewed applied to 2008 7 Tratal as distributions are reviewed applied to 2008 7 Tratal as distributions are reviewed applied to 2008 8 O. 1 Tratal of line 3 (4 capt 4 dis Sectional line 3 8 Tratal as distributions are reviewed as a societies of the section 4842(1) tax has been previously assessed 8 Undistributed income for 2007. Subtract line 4 from line 20 9 Tratal as distributions are reviewed as distributions used of corpus to satisfy requirements imposed by section 17(0)(1)(1)(1) or 4942(9)(3) 9 Tratal of line 9 8 Texases distributions carryover trono 2009, Subtract lines 4 and 5 from line 5 or line 7 9 Excess distributions carryover trono 2009, Subtract lines 4 and 5 from line 5 or line 7 9 Excess distributions carryover trono 2009, Subtract lines 4 and 5 from line 5 or line 7 9 Excess distributions carryover trono 2009, Subtract lines 7 and 6 from line 6 or line 9 8 Excess from 2004 9 Excess from 2004 9 Excess from 2004 1	b Total for prior years				
a From 2003 b From 2004 c From 2005 d 177, 289. d From 2006 e From 2007 d 207, 925. 1 Total of lines S at through e 1 Cualifying distributions for 2008 from Part XII, line 4 ▶ \$ 3,962,606. a Replied to 2007, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) d Applied to 2008 distributions out of corpus (Election required - see instructions) d Applied to 2008 distributions out of corpus (Election required - see instructions) 5 Excess distributions cerpover applied to 2008 (If an arroad registrian is colume), file a sea arrandous 1, 883, 210. 5 Excess distribution express a sea arrandous 1, 883, 210. 5 Excess distribution express a propert to 2008 (If an arroad registrian is colume), file as arrandous 1, 883, 210. 5 Excess from 2004 A From the 2 at 7 sable amount of prior years undistributed income for which the section 449(2) but xan been in privously sessessed 4 Subtract line 6 from line 6 Toxable amount - see instructions e Undistributed income for 2007. Subtract line 4s from line 2 a Taxable amount - see instructions e Undistributed income for 2007. Subtract line 4s from line 2 a Taxable amount - see instructions e Undistributed income for 2007. Subtract line 4s from line 2 a Taxable amount - see instructions e Undistributed income for 2007. Subtract line 4s from line 2 a Taxable amount - see instructions e Undistributed income for 2007. Subtract line 4s from line 2 a Taxable amount - see instructions e Undistributed income for 2007. Subtract line 4s from line 2 a Taxable amount - see instructions 0 . Excess from line 6 from line 6 Toxable amount - see instructions 0 . Excess from 2004 Excess from 2004 Excess from 2005 407, 925. Excess from 2006 Excess from 2006 Excess from 2006 1, 883, 210.			0.		
b From 2005	3 Excess distributions carryover, if any, to 2008				
4 From 2005 4 From 2007 4 Total of lines 3s through e A Unathym distributions for 2008 from Part XI, line 4 ► \$ 3,952,606. 4 Applied to undistributed income of pror years (Election required - see instructions) 5 Expess distributions out of corpus (Election required - see instructions) 6 Applied to undistributed out of corpus (Election required - see instructions) 7 Expess distributions out of corpus (Election required - see instructions) 8 Remaining amount distributed out of corpus (Election required - see instructions) 9 Expess distributions out of corpus (Election required - see instructions) 1	a From 2003				
4 From 2006					
## From 2007	c From 2005 417, 289.				
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4. Qualifying distributions for 2008 from Part XII, line 4 Ps 3,962,606. 4 Applied to 2007, but not more than line 2a	e From 2007 407,925.				
Part XII, line 4 ► \$ 3,962,606. a Applied to 2007, but not more than line 2a b Applied to undistributed income of prior years (Electron required - see instructions) c Treated as distributions out of corpus (Electron required - see instructions) d Applied to 2008 distributable amount a Remaning amount distributable out of corpus Enter the net total of each roturn as indicated below: 1,883,210. 1,	f Total of lines 3a through e	1,488,807.			
a Applied to 2007, but not more than line 2a b Applied to undistributed income of prior years (Election required - see instructions) C Treated as distributions out of corpus (Election required - see instructions) d Applied to 2008 distributable amount a Remaining amount distributed out of corpus 5 Cocess distributions carryover applied to 2008 (if an amount appears in column (st.) the same amount must be about no column (st.) the same amount must be about no column (st.) the same amount must be about no column (st.) the same amount indicated below: 3 Corpus Add Iren 21 4.6. and 46 Subtract line 8 1 Prior years' undistributed income Subtract line 4 from line 20 2 E Enter the amount of prior years' undistributed come for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed 4 Subtract line 65 from line 65 Taxable amount - see instructions 2 Undistributed income for 2007. Subtract line 4 from line 2a Taxable amount - see instructions 2 Undistributed income for 2007. Subtract line 4 from line 2a Taxable amount - see instructions 2 Undistributed income for 2008 Subtract lines 44 and 5 from line 1 This amount must be distributed income for 2008 Subtract lines 44 and 5 from line 1 This amount must be distributed income for 2008 Subtract lines 44 and 5 from line 6 This amount must be distributed as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(b)(3) 5 Excess firm 2006 4 17, 289, 5 Excess from 2006 1, 289 3, 291. Excess from 2006 4 17, 289, 5 Excess from 2007 1, 283, 210.					
b Applied to undistributed income of pror years (Election required - see instructions) c Treated as distributions out of corpus (Election required - see instructions) d Applied to 2008 distributable amount a Remaning amount distributed out of corpus 5 Excess distributions carryover applied to 2008 (file amount appears in column (a)) 5 Excess from 2006 6 Excess from 2006 1	Part XII, line 4 ►\$ 3,962,606.				
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(Election required - see instructions) d Applied to 2008 distributable amount as Remaining amount distributed out of corpus 5. Excess distributions carryover times to be shown in column (i), the same amount must be shown in column (ii), the same amount must be shown in column (iii), the same amount must be shown in column (iii), the same amount must be shown in column (iii), the same amount must be shown in column (iii), the same amount must be shown in column (iii), the same amount is necessary in the section of a seed of the section of the section of a seed of the section of the section of the section of a seed of the section of	years (Election required - see instructions)		0.		
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5 Excess distributions carryover applied to 2008 (dia amount appears in column (d), the same amount must be shown in column (a) and the same amount must be shown in column (d). The same amount must be shown in column (d) and same and subtract line 4 from line 20 2 Enter the amount of prior years' undistributed income or which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed undistributed income for 2007. Subtract line 4 arom line 2a Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4 arom line 2a Taxable amount - see instructions 1 Undistributed income for 2008 Subtract lines 4 and 5 from line 1 This amount must be distributed in 2009 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2003 not applied on line 5 or line 7 9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2004 b Excess from 2005 c Excess from 2005 c Excess from 2006 c Excess from 2007 c Excess from 2007 c Excess from 2007 c Excess from 2008 1, 883, 210.	d Applied to 2008 distributable amount				2,079,396.
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Enter the net total of each column as indicated below: 3 , 372 , 017 .	(If an amount appears in column (d), the same amount	0.			0.
3 , 372 , 017 . b Pror years' undistributed income Subtract line 4b from line 2b c. Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2007. Subtract line 4a from line 2a Taxable amount - see instructions e Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount - see instructions be distributed in 2009 7. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(11)(F) or 4942(g)(3) 8. Excess distributions carryover from 2003 not applied on line 5 or line 7 9. Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a 10. Analysis of line 9 a Excess from 2004 d Excess from 2005 d Excess from 2006 d Excess from 2007 d 407, 925. e Excess from 2008 1, 883, 210.	6 Enter the net total of each column as				
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Inne 4b from line 2b C	-	0/0/2/02/			
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.		
undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed d Subtract line 6c from line 6b Taxable amount - see instructions e Undistributed income for 2007. Subtract line 4a from line 2a Taxable amount - see instructions f Undistributed income for 2008. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2009. Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3). Excess distributions carryover from 2003 not applied on line 5 or line 7. Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a. Analysis of line 9. a Excess from 2004. b Excess from 2004. C Excess from 2005. c Excess from 2006. d Excess from 2007. e Excess from 2008. 1, 883, 210.	· · · · · · · · · · · · · · · · · · ·				
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be distributed in 2009 7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2003 not applied on tine 5 or line 7 9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2004	f Undistributed income for 2008 Subtract				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8 Excess distributions carryover from 2003 not applied on line 5 or line 7 9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2004	lines 4d and 5 from line 1. This amount must				
corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) 8	be distributed in 2009				0.
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8 Excess distributions carryover from 2003 not applied on line 5 or line 7 9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2004 b Excess from 2005 c Excess from 2006 d Excess from 2007 e Excess from 2008 1,883,210.	corpus to satisfy requirements imposed by				
not applied on fine 5 or line 7 9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a 10 Analysis of line 9 a Excess from 2004 b Excess from 2005 c Excess from 2006 d Excess from 2007 e Excess from 2008 1,883,210.	section 170(b)(1)(F) or 4942(g)(3)	0.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	8 Excess distributions carryover from 2003				
Subtract lines 7 and 8 from line 6a 3, 372, 017. 10 Analysis of line 9 a Excess from 2004 663, 593. b Excess from 2005 417, 289. c Excess from 2006 Excess from 2007 1, 883, 210.	not applied on line 5 or line 7	0.			
10 Analysis of line 9 a Excess from 2004 663,593. b Excess from 2005 417,289. c Excess from 2006 Excess from 2007 1,883,210.	9 Excess distributions carryover to 2009.				
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	B Excess from 2008 1,883,210.			1	- 200 77

	FAMILY FO			38-60	71154 Page 10
Part XIV Private Operating F	oundations (see)	nstructions and Part V	(II-A, question 9)	N/A	
1 a If the foundation has received a ruling of	r determination letter th	at it is a private operating	1		
foundation, and the ruling is effective fo	r 2008, enter the date o	f the ruling	▶		
b Check box to indicate whether the found	dation is a private opera	ting foundation described	I in section	4942(j)(3) or 49	942(1)(5)
2 a Enter the lesser of the adjusted net	Tax year		Prior 3 years		
income from Part I or the minimum	(a) 2008	(b) 2007	(c) 2006	(d) 2005	(e) Total
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		İ			
exempt activities	4				•
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				Ì	
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					
secunties 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	<u> </u>				
Part XV Supplementary Info			, if the foundation	n had \$5,000 or m	ore in assets
at any time during t	_	instructions.)			
1 Information Regarding Foundation					
a List any managers of the foundation where year (but only if they have contributed in the contributed in	io have contributed moi nore than \$5,000) (See	e than 2% of the total co section 507(d)(2))	ntributions received by the	e foundation before the clo	se of any tax
LIDO A. IACOCCA					
b List any managers of the foundation wh			or an equally large port	ion of the ownership of a p	partnership or
other entity) of which the foundation ha	is a 10% or greater intel	est			
2 Information Regarding Contribut	ion Grant Gift Loa	n Sabalambia ata 1	Dramono:		
Check here ► ☐ If the foundation of				not account upperheated reco	usoto for fundo. If
the foundation makes gifts, grants, etc	(see instructions) to inc	s to presencted charitable lividuals or organizations	e organizations and does under other conditions ic	not accept unsulcited requirements	desis ini inings ii
a The name, address, and telephone num				omplete itemo Eu, e, e, un	
KATHRYN IACOCCA HENT			ie audiesseu		
867 BOYLSTON STREET,			A 02116		
b The form in which applications should l					· - · · · · · · · · · · · · · · · · · · ·
GRANT APPLICATION AT					
c Any submission deadlines THERE ARE NO SUBMISS	SION DEADLT	NES			
d Any restrictions or limitations on award	s, such as by geograph	ical areas, charitable field			
PRIMARILY CONCERNED	WITH DIABE	TES RESEARC	H - RELATED	ACTIVITIES	

Page 11

Supplementary Informatio Grants and Contributions Paid During the	Year or Approved for Future F	Payment		
Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Paid during the year	or substantial contributor	recipient		
The daming the year				
				,
SEE STATEMENT 12 Total		<u> </u>		33955
Approved for future payment			▶ 3a	33933
 				
Total SEE STATEMENT 13		<u></u>	> 2h	20292

Form 990-PF (2008)

Part XVI-A	Analysis	of Income	-Producing	Activities
* *** * * * * * * * * * * * * * * * * *	, ,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,			,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,,

iter gross amounts unless otherwise indicated.		business income		ed by section 512, 513, or 514	(e)
Program service revenue	(a) Business code	(b) Amount	Exclu- sion code	(d) Amount	Related or exempt function income
					
	-				·
<u> </u>					
d	_		- - -		
	_		+++		
f	_		+-+		
g Fees and contracts from government agencies			+		
Membership dues and assessments					
Interest on savings and temporary cash					
investments			1 1 1	1 765 510	
Dividends and interest from securities		.	14	1,765,513.	
Net rental income or (loss) from real estate	-				
a Debt-financed property					
b Not debt-financed property	-				
Net rental income or (loss) from personal					
property			+		
Other investment income	<u> </u>	-			
Gain or (loss) from sales of assets other					
than inventory			18	<55,979.	>
Net income or (loss) from special events					
Gross profit or (loss) from sales of inventory					
Other revenue					
a					
a					
b					
	1 1				
b					
b					
b			0.	1,709,534.	
b t t t t			0.	1,709,534.	1,709,53
b			0.		1,709,53
b c d e Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) ee worksheet in line 13 instructions to verify calculation	us)			13	1,709,53
t t d e Subtotal Add columns (b), (d), and (e) Total. Add line 12, columns (b), (d), and (e) ee worksheet in line 13 instructions to verify calculation Part XVI-B Relationship of Activitie	es to the Acco	omplishment of	Exempt	Purposes	1,709,53
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Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations	_	90-PF (20	008) IACOC	CA FAMILY	FOUND	ATION		38-60	71154	Pa	ige 13
1 Dot the organization directly or indirectly engine may of the following with any other organization discribed in section 501(c) of the Code (other than section 501(c)) organizations) or in section 527, relating to political organizations? 3 Transfers from the reporting foundation to a noncharitable exempt organization of (1) Cash assets 5 Other transactions 10 (2) Other assets 5 Other transactions 11 (2) Purchases of assets from a noncharitable exempt organization 12 (2) Other assets 5 Other transactions 13 (2) Purchases of assets from a noncharitable exempt organization 13 (3) Renalt of foreities, sequement or other assets 14 (4) Remodurement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundrasing solicitations (7) Performance of services or membership or fundrasing solicitations (8) Performance of services or membership or fundrasing solicitations (9) Performance of services or membership or fundrasing solicitations (10) Loans or loan guarantees (10) Loans or loan guarantees (11) Loans or loan guarantees (12) Loans or loan guarantees (13) Loans or loan guarantees (14) Loans or loan guarantees (15) Loans or loan guarantees (16) Amount any of the above is "res", complete the following schedule Column (b) should always show the fair market value of the goods, clast assets, or services greated or any of the above is "res", complete the following schedule or any organization (b) Description of reactions, fundactions, and sharing arrangements 10 N / A Description of reactions, supplied to the following schedule (c) Name of noncharitable exempt organization (c) Description of relationships 10 N / A Description of relationships 11 N / A Description of relationships 12 N / A Description of relationships 13 N / A Description of relationships 14 Description of relationships 15 Description of relationships 16 Description of relationships 17 Description of relationships 18 Description of relationships 19 D	Part	XVII			sfers To a	and Transactions	aı	nd Relationships With Noncl	haritable		
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(2) Other sassts 10 Other transactions (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (3) Rental of facilities, equipment, or other assets (4) Remitimizement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundraising solicitations (5) Island of facilities, equipment, mailing lists, other assets, or paid employees (6) Performance of services or membership or fundraising solicitations (7) Island or services approximately the reporting foundation in the understanding schedule. Column (b) should always show the fair market value of the goods, other assets, or services received (8) Performance of services or membership or fundraising schedule. Column (b) should always show the fair market value of the goods, other assets, or services received (9) Inversor (10) Amount involved (1						• •	anı	zations?			
20 Differ transactions 18(2) X 18(1) X X 18(1) X 18(1) X 18(1) X 18(1) X 18(1) X X 18(1) X 18(1) X 18(1) X 18(1) X 18(1) X X 18(1) X 18(1) X 18(1) X 18(1) X 18(1) X X 18(1) X 18(1) X 18(1) X 18(1) X 18(1) X X 18(1) X 18(1) X 18(1) X 18(1) X 18(1) X X 18(1) X 18(1) X 18(1) X 18(1) X 18(1) X X 18(1) X 18(1) X 18(1) X 18(1) X 18(1) X X 18(1) X 18(1) X 18(1) X 18(1) X 18(1) X X 18(1) X 18(1) X 18(1) X 18(1) X 18(1) X X 18(1) X 18(1) X 18(1) X 18(1) X 18(1) X X 18(1) X 18(1) X X 18(1) X X X X X X X X X			from the reporting found	ation to a noncharitat	ole exempt or	ganization of					,,
10. Other transactions (1) Sales of assets to a noncharitable exempt organization (2) Purchases of assets from a noncharitable exempt organization (3) Rental of facilities, equipment, or other assets (4) Permittenance arrangements (5) Loans or toan quarantees (6) Performance of services or membership or fundraising solicitations (7) Performance of services or membership or fundraising solicitations (8) Performance of services or membership or fundraising solicitations (9) Performance of services or membership or fundraising solicitations (1) Intel® X (1) Intel® X (1) Intel® X (2) Intel® X (3) Intel® X (4) Intel® X (5) Performance of services or membership or fundraising solicitations (6) Performance of services or membership or fundraising solicitations (7) Intel® X (8) Performance of services or membership or fundraising solicitations (8) Intel® X (9) Performance of services or membership or fundraising solicitations (9) Intel® X (10) Intel® X (11) Intel® X (11) Intel® X (12) Intel® X (13) Intel® X (14) Intel® X (15) Intel® X (16) Intel® X (17) Intel® X (18) In	•	•	anasta.								X
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(2) Purchases of assets from a nonchartable exempt organization (3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan guarantees (6) Performance of services or membership or fundrasing solicitations (6) Performance of services or membership or fundrasing solicitations (7) A strange of facilities, equipment, mailing lists, other assets, or paid employees (8) Performance of services or membership or fundrasing solicitations (8) Performance of services or membership or fundrasing solicitations (9) Performance of services or organization for services given by the reporting foundation if the foundation received less than fair market value in any transaction or sharing arrangement, show in column (9) the value of the goods, other assets, or services received (1) Name of nonchartable exempt organization (1) Amount involved (2) Name of nonchartable exempt organization (3) Loans or loan guarantees are serviced for the services of the goods, other assets, or services received (1) Loans or loan guarantees are serviced for the services of the goods, other assets, or services received (2) Loans or loan guarantees are serviced from the foundation received less than fair market value in any transaction or sharing arrangements, show in column (9) the value of the goods, other assets, or services received (1) Loans or loan guarantees are serviced from the foundation received less than fair market value in any transaction or sharing arrangements, show in the goods, other assets, or services received for grantation (1) Description of transfers, transactions, and sharing arrangements (2) Loans or loan guarantees (1) Loans or sharing arrangements, show in the goods, or sharing arrangements, show in the goods, or sharing arrangements are sharing arrangements. The goods of the g				ble exempt organizat	inn				16(1)		x
(3) Rental of facilities, equipment, or other assets (4) Reimbursement arrangements (5) Loans or loan quarantees (6) Performance of services or membership or fundraising solicitations (7) Loans or loan quarantees (8) Performance of services or membership or fundraising solicitations (8) Performance of services or membership or fundraising solicitations (8) Performance of services or membership or fundraising solicitations (9) Rentomance of services or membership or fundraising solicitations (11) Loans	-	•		. •							
(6) Performance of services or membership or fundrasing solicitations 8. Sharing of facilities, equipment, mailing lists, other assets, or paid employees 9. 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 greewed 10. In the value of the goods, other assets, or services received 10. Amount involved 10. Amo				•	•						
(e) Performance of services or membership or fundraising solicitations 1 https://dx.doi.org/10.1001/1	(4) Reimb	oursement arrangements	1					1b(4)		
E Sharing of facilities, equipment, mailing lists, other assets, or paid employees It X 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 received a) Line no (b) Amount involved (c) Name of nonchartable exempt organization (d) Decomposing of varieties, transactions, and sharing arrangements N/A 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organization (d) Decomposing of varieties, transactions, and sharing arrangements N/A 2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organization in section 501(c) of the Code (other than section 501(c)(s)) or in section 527? If Yes Complete the following schedule (a) Name of organization (b) Type of organization (c) Description of relationship N/A Under pervalues of peglinif, longitudinal range example time return, including scorongrying schedules and stratements, and to the best of my knowledge and betted, it is true, correct, and complete Sychiamics and splittle from the market of the pool of the pool of relationship Under pervalues of peglinif, longitudinal range examples time return, including scorongrying schedules and stratements, and to the best of my knowledge and betted, it is true, correct, and complete Sychiamics and splittle from the market of the pervalues of the peace of the pegalogy		•	•						1b(5)		
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. a) Line no. (b) Amount involved. (c) Name of nonchartable exempt organization. (d) Description of trensfers, transactions, and sharing arrangements. N / A. (e) Name of nonchartable exempt organization. (d) Description of trensfers, transactions, and sharing arrangements. N / A. (a) Description of trensfers, transactions, and sharing arrangements. N / A. (b) Amount involved. (e) Name of nonchartable exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 52?? D If 'Yes, complete the following schedule. (a) Name of organization. (b) Type of organization. (c) Description of relationship. N / A. (c) Description of relationship. Under penalties of gefors, i cacjaet but flow exempted the neture, inappend accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration pages from the following schedule. PRESIDENT Title Preparer's HOMAS WASHBURN, CPA O6 / O3 / 10 Smilloyed. 21 EAST MAIN STREET											
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column (d) the value of the goods, other assets, or services received Column Co										ets,	
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In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?					N/A						
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?											
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In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?		+								• •	
In section 501(c) of the Code (other than section 501(c)(3)) or in section 527?	2a Is	the foun	dation directly or indirec	tly affiliated with, or r	elated to one	or more tax-exempt orga	1017	ations described			
Under penalties of penury, I decign 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 appearer to the frame for true feet. Signature of officer or true feet. Preparer's identifying number signature of the firm's name (or yours ALEXANDER, ARONSON, FINNING & CO., P.C. EIN 21 EAST MAIN STREET									Yes	ΓX	□ No
Under penalties of paginy, I declare that 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 penalties of paginy, I declare that 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 penalties of paginy, I declare that 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 the penalties of paginy, I declare that 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 this penalties of paginy, I declare that 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 this penalties of paginy, I declare that 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 my knowledge and belief, it is true, correct, and complete Declaration of my knowledge and belief, it is true, correct, and complete Declaration of my knowledge and belief, it is true, correct, and complete Declaration of my knowledge and belief, it is true, correct, and complete Declaration of my knowledge and belief, it is true, correct, and correct and complete Declaration of my knowledge and belief, it is true, correct, and correct and corr			mplete the following sch	edule						-	
Under penalties of perjun, I declare than have exampled this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of sense (other than tax payer or fiduciarly is based on all information of which preparer has any knowledge PRESIDENT				ganization		(b) Type of organization	n	(c) Description of relation	onship		
and complete Declaration of separater (other than tax payer or fiduciary) based on all information of which preparer has any knowledge PRESIDENT Title Preparer's identifying number self- signature Preparer's identifying number self- signature Preparer's identifying number self- signature Firm's name (or yours ALEXANDER, ARONSON, FINNING & CO., P.C. EIN It self-employed). 21 EAST MAIN STREET			N/A_				4				
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Signature of officer or trueter Preparer's signature Title Date and	complete	Declaration of the after (other	of than taxpayer or fiducia	ary/is/based on	all Information of which prepa	irer i	has any knowledge				
Time's name (or yours ALEXANDER, ARONSON, FINNING & CO., P.C. EIN >			WIMP	Juny	fer	19-13-17	<u>U</u>	PRESIDENT			
Time's name (or yours ALEXANDER, ARONSON, FINNING & CO., P.C. EIN >		Signatu	re of officer or truetee			Date					
Time's name (or yours ALEXANDER, ARONSON, FINNING & CO., P.C. EIN >	5	Pre		W	-LDA		Da		parer's identif	yıng nur	nber
Firm's name (or yoys's ALEXANDER, ARONSON, FINNING & CO., P.C. EIN	ַ פַּיִן מֿ	Sign	ATEN					* "-			
address, and ZIP code WESTBORO, MA 01581 Phone no 508-366-9100	P a	Firm's		-	•		C	J., P.C. EIN ►			
	ه ا	addre						Phone no 508	3-366-	910	0

Phone no

Schedule B (Form 990, 990-EZ, or 990-PF)

Department of the Treasury Internal Revenue Service

Name of the organization

Schedule of Contributors

Attach to Form 990, 990-EZ, and 990-PF.

OMB No 1545-0047

Employer identification number IACOCCA FAMILY FOUNDATION 38-6071154 Organization type (check one): Filers of: Section: Form 990 or 990-EZ 501(c)() (enter number) organization 4947(a)(1) nonexempt charitable trust not treated as a private foundation 527 political organization Form 990-PF X 501(c)(3) exempt private foundation 4947(a)(1) nonexempt charitable trust treated as a private foundation 501(c)(3) taxable private foundation Check if your organization is covered by the General Rule or a Special Rule. (Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.) General Rule For organizations filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. **Special Rules** For a section 501(c)(3) organization filing Form 990, or Form 990-EZ, that met the 33 1/3% support test of the regulations under sections 509(a)(1)/170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on Form 990, Part VIII, line 1h or 2% of the amount on Form 990-EZ, line 1. Complete Parts I and II. For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, aggregate contributions or bequests of more than \$1,000 for use exclusively for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III. For a section 501(c)(7), (8), or (10) organization filing Form 990, or Form 990-EZ, that received from any one contributor, during the year, some contributions for use exclusively for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. (If this box is checked, enter here the total contributions that were received during the year for an exclusively religious, charitable, etc., purpose. Do not complete any of the parts unless the General Rule applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year.) \$ Caution. Organizations that are not covered by the General Rule and/or the Special Rules do not file Schedule B (Form 990, 990-EZ, or 990-PF), but they must answer "No" on Part IV, line 2 of their Form 990, or check the box in the heading of their Form 990-EZ, or on line 2 of their Form 990-PF, to certify that they do not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Schedule B (Form 990, 990-EZ, or 990-PF) (2008)

	1	1	
Page	⊥ of	⊥ of Part I	

Name of organization

Employer identification number

IACOCCA FAMILY FOUNDATION

38-6071154

Part I	Contributors (see instructions)		
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	IACOCCA CLUT F/B/O ARIANNA ASSAD C/O COMERICA DETROIT, MI 48226	_ \$132,992.	Person X Payroll
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
2	IACOCCA CLUT F/B/O PARKER LEE HENTZ C/O COMERICA BANK DETROIT, MI 48226	- \$ 163,302.	Person X Payroli Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		_ _ _ _	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
			Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.)
(a) No.	(b) Name, address, and ZiP + 4	(c) Aggregate contributions	(d) Type of contribution
	18-08	\$	Person Payroll Noncash (Complete Part II if there is a noncash contribution.) 990, 990-EZ, or 990-PF) (2008

FORM 990	0-PF G	AIN OR (LOSS) FROM SALE	OF	ASSETS	_	STA	TEMENT	
DESCRIPT	(A) TION OF PROPERTY	?		1	MANNER ACQUIRED	DA'		DATE SO	DLD
PIMCO				PU	JRCHASED	06/2	8/04	01/03	08
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE SALE		(E) DEPRI			(F) OR LOSS	5
-	715,000.	1,392,16		0		0.		<677,10	52.
DESCRIP'	(A) TION OF PROPERTY	?		1	MANNER ACQUIRED	DA' ACQU		DATE S	OLD
SECURIT	IES	_		Pi	URCHASED	01/0	1/08	12/31	/08
	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE SALE		(E DEPRI		GAIN	(F)	S
•	4,633,635.	4,012,45	52.	0	•	0.		621,1	83.
	GAINS DIVIDENDS								0.
TOTAL TO	O FORM 990-PF, I	PART I, LINE	6A			;		<55,9	79.
FORM 99	0-PF D	IVIDENDS AND	INTEREST FF	ROM	SECURITI:	ES	STA	TEMENT	2
SOURCE			GROSS AMOUN	1T	CAPITAL DIVID			LUMN (A AMOUNT)
COMERIC	A	•	2,03			0.		2,0 4,7	
HALL SCHWAB			1,758,76			0.		1,758,7	

FORM 990-PF	LEGAL	FEES	Si	PATEMENT	3
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITAE PURPOSE	
LEGAL	43,335.	6,500.		36,83	35.
TO FM 990-PF, PG 1, LN 16A	43,335.	6,500.		36,83	35.
FORM 990-PF	ACCOUNTI	NG FEES	S	PATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITAE PURPOSE	
ACCOUNTING	11,025.	1,654.		9,37	71.
TO FORM 990-PF, PG 1, LN 16B	11,025.	1,654.		9,37	71.
FORM 990-PF (OTHER PROFES	SIONAL FEES	S	TATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITAI PURPOSI	
OTHER	118,312.	56,583.		43,63	30.
TO FORM 990-PF, PG 1, LN 16C	118,312.	56,583.		43,6	30.
FORM 990-PF	TAX	ES	S	TATEMENT	€
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITA PURPOS:	
EXCISE TAX PAYROLL TAXES REAL ESTATE TAXES	35,000. 22,061. 5,433.	7,895.		14,1	
TO FORM 990-PF, PG 1, LN 18	62,494.	7,895.		19,5	99
TO FORM 990-PF, PG 1, LN 18	62,494.	7,895.		19	,5

	OTHER E	XPENSES	_		STATEMENT
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVES MENT INCO		(C) ADJUSTED NET INCOM	
SUPPLIES TELEPHONE POSTAGE, SHIPPING & DELIVERY INSURANCE OUTSIDE COMPUTER SERVICES PAYROLL PROCESSING FEES STORAGE MEALS	9,219. 10,794. 4,272. 28,176. 2,927. 2,481. 5,883. 9,054.	1,6 4,2 1,1	383. 619. 641. 226. 439. 372. 882. 358.		7,836. 9,175. 3,631. 23,950. 2,488. 2,109. 5,000. 7,696.
REPAIRS MISCELLANEOUS	450. 118.		68. 18.	_	383 100
TO FORM 990-PF, PG 1, LN 23	73,374.	11,0	006.		62,368
DESCRIPTION		LUATION ETHOD	воо	K VALUE	FAIR MARKET VALUE
DESCRIPTION CORPORATE STOCKS AND BONDS FUNCASH AND MONEY MARKET FUNDS	ND		26	K VALUE ,496,478.	
CORPORATE STOCKS AND BONDS FUR	ND M	ETHOD COST	26 4	,496,478.	VALUE 26,496,478
CORPORATE STOCKS AND BONDS FUNCASH AND MONEY MARKET FUNDS	ND, LINE 13	ETHOD COST COST	26 4 30	,496,478. ,300,295. ,796,773.	VALUE 26,496,478 4,300,295
CORPORATE STOCKS AND BONDS FUNCASH AND MONEY MARKET FUNDS TOTAL TO FORM 990-PF, PART II,	ND, LINE 13 ASSETS NOT	ETHOD COST COST	26 4 30 INVE	,496,478. ,300,295. ,796,773.	VALUE 26,496,478 4,300,295 30,796,773
CORPORATE STOCKS AND BONDS FUNCASH AND MONEY MARKET FUNDS TOTAL TO FORM 990-PF, PART II, FORM 990-PF DEPRECIATION OF	ND, LINE 13 ASSETS NOT	COST COST HELD FOR	26 4 30 INVE	,496,478. ,300,295. ,796,773. STMENT	VALUE 26,496,478 4,300,295 30,796,773 STATEMENT

FORM 990-PF	OTHER ASSETS		STATI	EMENT 10
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE		MARKET ALUE
CSV LIFE INSURANCE POLICY REAL ESTATE REAL RETURN FUND	1,612,652. 1,632,802.	1,692,88 475,37		,692,888. 475,377.
TO FORM 990-PF, PART II, LINE 15	3,245,454.	2,168,26	5. 2	,168,265.
	ST OF OFFICERS, I		STAT	EMENT 11
NAME AND ADDRESS	TITLE AND AVRG HRS/WK		EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
LIDO A. IACOCCA 867 BOYLSTON STREET, 6TH FLOOR BOSTON, MA 02116	CHAIRMAN 3.00	0.	0.	0.
KATHRYN IACOCCA HENTZ 867 BOYLSTON STREET, 6TH FLOOR BOSTON, MA 02116	PRESIDENT 40.00	200,000.	26,280.	0.
JOHN GERACE 867 BOYLSTON STREET, 6TH FLOOR BOSTON, MA 02116	TRUSTEE 2.00	0.	0.	0.
JASON VINES 867 BOYLSTON STREET, 6TH FLOOR BOSTON, MA 02116	TRUSTEE 1.00	0.	0.	0.
LOUIS E. LATAIF 867 BOYLSTON STREET, 6TH FLOOR BOSTON, MA 02116	SECRETARY 1.00	0.	0.	0.
LIA IACOCCA-ASSAD 867 BOYLSTON STREET, 6TH FLOOR BOSTON, MA 02116	TRUSTEE 1.00	0.	0.	0.
DESMOND HEATHWOOD 867 BOYLSTON STREET, 6TH FLOOR BOSTON, MA 02116	TRUSTEE 1.00	0.	0.	0.

, IACOCCA FAMILY FOUNDATION			38	3-6071154
DANA A. BALL 867 BOYLSTON STREET, 6TH FLOOR BOSTON, MA 02116	FORMER EXECUTIVE 20.00	DIRECTOR 72,500.		0.
KEN ANDERSON 867 BOYLSTON STREET, 6TH FLOOR BOSTON, MA 02116	TRUSTEE 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6,	, PART VIII	272,500.	33,705.	0.
	AND CONTRIBUTIONS DURING THE YEAR		STATE	EMENT 12
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATI		ECIPIENT STATUS	AMOUNT
BOSTON LIVING CENTER 29 STANHOPE STREET, BOSTON, MA 02116	UNRESTRICTED	,		1,000.
COMMUNITY SERVINGS 18 MARBURY TERRACE, JAMAICA PLAIN, MA 02130	UNRESTRICTED			3,000.
COMMUNITY SERVINGS 18 MARBURY TERRACE, JAMAICA PLAIN, MA 02130	RESTRICTED FOR INTERNATIONAL PRO AFRICA	OGRAM		23,140.
THE HARVARD SCHOOL OF PUBLIC HEALTH 124 MT. AUBURN STREET, CAMBRIDGE, MA 02138	RESTRICTED FOR ST HEALTHY CUP EVENT			10,000.
ST. JOHN'S HIGH SCHOOL 378 MAIN STREET, SHREWSBURY, MA 01545	UNRESTRICTED			5,000.
LEHIGH UNIVERSITY 111 RESEARCH DRIVE, BETHLEHAM, PA 18015	RESTRICTED FOR G	LOBAL		19,500.

IACOCCA FAMILY FOUNDATION		38-6071154
DOVER AND SHERBORN EDUCATION FUND P.O. BOX 421, DOVER, MA 02031	UNRESTRICTED	5,000.
DANA HALL SCHOOL 45 DANA ROAD, WELLESLEY, MA 02482	UNRESTRICTED	25,000.
ST. SEBASTIANS SCHOOL 1191 GREENDALE AVENUE, NEEDHAM, MA 02492	UNRESTRICTED	25,000.
BIG SISTER ASSOCIATION OF GREATER BOSTON 161 MASSACHUSETTS AVENUE, BOSTON, MA 02115-3050	UNRESTRICTED	5,000.
ST. JOSEPH PARISH 1382 HIGHLAND AVENUE, NEEDHAM, MA 02492-2694	UNRESTRICTED	500.
CRANBROOK SCHOOL 520 LONE PINE ROAD, P.O. BOX 801, BLOOMFIELD HILLS, MI 48303	UNRESTRICTED	10,000.
DANA HALL SCHOOL 45 DANA ROAD, WELLESLEY, MA 02482	RESTRICTED FOR GOLF & TENNIS TOURNAMENT	600.
ST. SEBASTIANS SCHOOL 1191 GREENDALE AVENUE, NEEDHAM, MA 02492	UNRESTRICTED	125,000.
NANTUCKET COTTAGE HOSPITAL 57 PROSPECT STREET, NANTUCKET, MA 02554	RESTRICTED FOR POPS 2008	15,000.
POPE JOHN PAUL II CULTURAL CENTER 3900 HAREWOOD ROAD NE, WASHINGTON, DC 20017-1555	UNRESTRICTED	1,000.
GOOD SHEPHERD CATHOLIC CHURCH 505 N. BEDFORD DRIVE, BEVERLY HILLS, CA 90210-3298	RESTRICTED FOR PIPE ORGAN	50,000.

1ACOCCA FAMILY FOUNDATION		38-6071154
MENTAL HEALTH ASSOCIATION IN MICHIGAN 30233 SOUTHFIELD ROAD, SUITE 220, SOUTHFIELD, MI 48076	IN HONOR OF DOUG AND WINNIE FRASER	5,000.
ANDRE SOBEL RIVER OF LIFE FOUNDATION 8899 BEVERLY BOULEVARD, SUITE 111, LOS ANGELES, CA 90048	UNRESTRICTED	2,000.
NEW YORK POPS INC. 111 W. 57TH STREET, SUITE 420, NEW YORK, NY 10019	25TH ANNIVERSARY, IN HONOR OF STEINBRENNERS	2,500.
THE ST. FRANCIS CABRINI PARISH 9000 LAURENCE AVENUE, ALLEN PARK, MI 48101	UNRESTRICTED	25,000.
THE RONALD REAGAN PRESIDENTIAL FOUNDATION 40 PRESIDENTIAL DRIVE, SIMI VALLEY, CA 93065	UNRESTRICTED	50,000.
THE CAMPAIGN FOR CATHOLIC SCHOOLS 143 NEWBURY STREET, 3RD FLOOR, BOSTON, MA 02116		25,000.
POPE JOHN PAUL II CULTURAL CENTER 3900 HAREWOOD ROAD NE, WASHINGTON, DC 20017-1555	UNRESTRICTED	1,000.
AMERICAN FRIENDS OF HEBREW UNIVERSITY 9911 WEST PICO BLVD #1520, LOS ANGELES, CA 90035	IN HONOR OF PATRICIA GLASER	5,000.
THE BAUM SCHOOL OF ART 510 LINDEN STREET, P.O. BOX 653, ALLENTOWN, PA 18105	IN MEMORY OF ALFRED COLARUSSO	1,000.
THE HEART FOUNDATION 32107 LINDERO CANYON ROAD, WESTLAKE VILLAGE, CA 91361	TRIBUTE TO BERRY GORDY	5,000.

IACOCCA FAMILY FOUNDATION		38-6071154
AMERICAN FRIENDS OF HEBREW UNIVERSITY 9911 WEST PICO BLVD #1520, LOS ANGELES, CA 90035	IN HONOR OF PATRICIA GLASER	5,000.
ANDRE SOBEL RIVER OF LIFE FOUNDATION 8899 BEVERLY BOULEVARD, SUITE 111, LOS ANGELES, CA 90048	UNRESTRICTED	1,000.
ARCHDIOCESE OF WASHINGTON P.O. BOX 29260, WASHINGTON, DC 20017	IN MEMORY OF TIM RUSSERT	10,000.
ASPEN VALLEY MEDICAL FOUNDATION P.O. BOX 1639, ASPEN , CO 81612	JERRY & GLENDA GREENWALD	5,000.
THE BRENT SHAPIRO FOUNDATION 10250 CONSTELLATION BOULEVARD, LOS ANGELES, CA 90067	UNRESTRICTED	10,000.
THE YOUNG MUSICIAN FOUNDATION 10100 SANTA MONICA BOULEVARD, LOS ANGELES, CA 90067	RESTRICED FOR "ASK YOUR MAMA"	5,000.
ST. SEBASTIANS 1191 GREENDALE AVENUE, NEEDHAM, MA 02492	UNRESTRICTED	125,000.
SACRED HEART CATHOLIC CHURCH 43775 DEEP CANYON ROAD, PALM DESERT, CA 92260	UNRESTRICTED	25,000.
DOCTORS WITHOUT BORDERS P.O. BOX 5023, HAGERSTOWN, MD 21741	UNRESTRICTED	1,000.
CALIFORNIA STATE PARKS FOUNDATION 50 SAN FRANCISCO STREET, SUITE 10, SAN FRANCISCO, CA 94133	UNRESTRICTED	1,000.

IACOCCA FAMILY FOUNDATION		38-6071154
THE TEXAS HEART INSITUTE P.O. BOX 20345, HOUSTON, TX 20345	DR. COOLEY	5,000.
SPECIAL OLYMPICS SOUTHERN CALIFORNIA 6730 EAST CARSON STREET, LONG BEACH, CA 90808	HONORING RICHARD RIORDAN	5,000.
KEEP MEMORY ALIVE 888 WEST BONNEVILLE AVENUE, LAS VEGAS, NV 89106	UNRESTRICTED	10,000.
LUPUS LA 9220 SUNSET BOULEVARD, SUITE 200, LOS ANGELES, CA 90069	RESTRICTED FOR THE HOLLYWOOD BAG LADIES LUNCHEON	2,500.
CARE FOR VRINDAVAN 135 HATHAWAY ROAD , SCHUYLERVILLE, NY 12871	UNRESTRICTED	5,000.
LAGUNA PRESBYTERIAN PRESCHOOL 415 FOREST AVENUE, LAGUNA BEACH, CA 92651	UNRESTRICTED	5,000.
STORYBOOK LADY CHARITABLE FOUNDATION P.O. BOX 1216, NEWPORT BEACH, CA 92659	UNRESTRICTED	5,000.
CAL POLY POMONA FOUNDATION, INC. 3801 WEST TEMPLE AVENUE, BLDG 55, POMONA, CA 91768	UNRESTRICTED	2,500.
THE BELIEVE IN SOBRIETY FOUNDATION 30025 ALICIA PARKWAY, #195, LAGUNA NIGUEL, CA 92677	UNRESTRICTED	2,500.
AIDS SERVICES FOUNDATION OF ORANGE COUNTY 17982 SKY PARK CIRCLE, IRVINE, CA 92614	UNRESTRICTED	5,000.

IACOCCA FAMILY FOUNDATION		38-6071154
AIDS/LIFECYLE DEPT. 9383, LOS ANGELES, CA 90084	UNRESTRICTED	1,000.
HOAG HOSPITAL FOUNDATION ONE HOAG DRIVE P.O. BOX 6100, NEWPORT BEACH, CA 92658	RESTRICTED FOR THE CIRCLE 1000 EVENT	7,500.
PROMISES FOUNDATION 11340 OLYMPIC BOULEVARD, #242, LOS ANGELES, CA 90064	UNRESTRICTED	15,000.
THE REACH FOUNDATION 3101 VILLA WAY, NEWPORT BEACH, CA 92660	UNRESTRICTED	30,000.
ST. GEORGE'S EPISCOPAL CHURCH 23802 AVENIDA DE LA CARLOTA, LAGUNA HILLS, CA 92653	UNRESTRICTED	5,000.
RAPE FOUNDATION 4413 ENSIGN AVENUE, NORTH HOLLYWOOD, CA 91602	UNRESTRICTED	5,000.
THE ORANGE COUNTY STEP HOUSE 32695 MARLIN COVE, LAGUNA NIGUEL, CA 92677	RESTRICTED FOR THE ASHLAND COUNTY BALL	850.
ORANGE COUNTY FRIENDS OF ST. JUDE 12365 LEWIS STREET SUITE 101, GARDEN GROVE, CA 92840		5,000.
MARIAN HIGH SCHOOL 7225 LAHSER ROAD, BLOOMFIELD HILLS, MI 48301	UNRESTRICTED	10,000.
THE PINSTRIPES FUND P.O. BOX 32861, CHARLOTTE, NC 28232	UNRESTRICTED	5,000.
ST. CATHERINE'S OF SIENNA 1042 TEMPLE TERRACE, LAGUNA BEACH, CA 92651	UNRESTRICTED	1,500.

IACOCCA FAMILY FOUND	DATION
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THE CAROUSEL OF HOPE / CHILDRENS DIABETES 777 GRANT STREET.SUITE 302, DENVER, CO 80203		15,000.
HUMAN OPTION P.O. BOX 53745, IRVINE, CA 92619	UNRESTRICTED	5,000.
LUPUS LA 9220 SUNSET BOULEVARD, SUITE 200, LOS ANGELES, CA 90069		2,500.
FEEDING AMERICA / LA REGIONAL FOOD BANK 1734 EAST 41ST STREET, LOS ANGELES, CA 90058	RESTRICTED FOR THE FRIENDSHIP SPONSOR FOR A SEASON FOR SHARING	2,500.
PLANET HOPE - CAMP HOPE 8205 SANTA MONICA BOULEVARD, LOS ANGELES, CA 90046	RESTRICTED FOR CAMP HOPE	12,500.
CATHOLIC BIG BROTHERS 1530 JAMES M. WOOD BOULEVARD, 2ND FLOOR, LOS ANGELES, CA 90015	RESTRICTED FOR THE JERRY L CAPPELLO MEMORIAL GOLF CLASSIC	4,000.
UNIVERSITY CAMPS INC 900 HILGARA AVENUE, SUITE 301, LOS ANGELES, CA 90024	RESTRICTED FOR THE CAMPER PAL LEVEL DONATION	1,000.
SECOND HARVEST FOOD BANK 1393 GALAXY DRIVE, NEWPORT BEACH, CA 92660	RESTRICTED FOR THE HARVESTERS UNDERWRITING CHAIR	1,000.
MIDNIGHT MISSION 601 SOUTH SAN PEDRO STREET, LOS ANGELES, CA 90014	UNRESTRICTED	3,000.

· 1ACOCCA FAMILY FOUNDATION		38-6071154
MAKE IT RIGHT FOUNDATION P.O. BOX 58009, NEW ORLEANS, LA 70158	UNRESTRICTED	7,500.
BETTY FORD CENTER 39000 BOB HOPE DRIVE, RANCHO MIRAGE, CA 92270	UNRESTRICTED	10,000.
ST. MARGARETS EPISCOPAL CHURCH 31641 LA NOVIA, SAN JUAN CAPISTRANO, CA 92675	RESTRICTED FOR THE LEGACY PLEDGE	20,000.
PROMISES FOUNDATION 11340 OLYMPIC BOULEVARD, #242, LOS ANGELES, CA 90064	RESTRICTED FOR MIRIAMS HOUSE	1,500.
YELLOWSTONE WOMENS 154 EAST BAY STREET, COSTA MESA, CA 92627	UNRESTRICTED	4,000.
CHILDREN OF THE NIGHT 14530 SYLVAN STREET, VAN NUYS, CA 91411	UNRESTRICTED	1,000.
OC RESCUE MISSION ONE HOPE DRIVE, TUSTIN, CA 92782	UNRESTRICTED	2,500.
ST. MARGARETS EPISCOPAL CHURCH 31641 LA NOVIA, SAN JUAN CAPISTRANO, CA 92675	UNRESTRICTED	1,000.
BELIEVE IN SOBRIETY 30025 ALICIA PARKWAY, #195, LAGUNA NIGUEL, CA 92677	UNRESTRICTED	2,500.
CANYON CLUB, INC. 50456 LAGUNA CANYON ROAD, LAGUNA BEACH, CA 92651	UNRESTRICTED	2,000.
CARDIOVASCULAR RESEARCH FOUNDATION OF SOUTHERN CALIFORNIA 414 NORTH CAMDEN DRIVE, SUITE 1100, BEVERLY HILLS, CA 90210	UNRESTRICTED	100,000.

· FACOCCA FAMILY FOUNDATION		38-6071154
BOSTON CHILDREN'S HOSPITAL 300 LONGWOOD AVENUE, BOSTON, MA 02115	UNRESTRICTED	179,290.
BAYLOR COLLEGE OF MEDICINE ONE BAYLOR PLAZA, MS: BCM 160, HOUSTON, TX 77030	UNRESTRICTED	300,000.
MEDICAL COLLEGE OF WISCONSIN 8701 WATERTOWN PLANK ROAD, MILWAUKEE , WI 53226	UNRESTRICTED	94,794.
DANA-FARBER CANCER INSTITUTE 44 BINNEY STREET, BOSTON, MA 02115	UNRESTRICTED	165,000.
CHILDRENS HOSPITAL LOS ANGELES 4650 SUNSET BOULEVARD, MS 35, LOS ANGELES, CA 90027	UNRESTRICTED	125,000.
MOUNT SINAI SCHOOL OF MEDICINE ONE GUSTAVE L. LEVY PLACE, NEW YORK, NY 10029	UNRESTRICTED	75,000.
MAYO CLINIC ROCHESTER 200 FIRST STREET SW, ROCHESTER, MN 55905	UNRESTRICTED	126,314.
UNIVERSITY OF MINNESOTA MEDICAL SCHOOL MMC 280, 420 DELAWARE STREET SE, MINNEAPOLIS, MN 55455	UNRESTRICTED	50,000.
REGENTS OF THE UNIVERSITY OF CALIFORNIA, SAN FRANCISCO 513 PARNASSUS AVENUE, SAN FRANCISCO, CA 94143	UNRESTRICTED	100,000.
UNIVERSITY OF VERMONT GIVEN BUILDING, C334A, BURLINGTON, VT 05405	UNRESTRICTED	99,411.

• I-ACOCCA FAMILY FOUNDATION		38-6071154
EASTERN VIRGINIA MEDICAL COLLEGE BOX 801405 ARBACH BUILDING, ROOM 1221, CHARLOTESVILLE, VA 22908	UNRESTRICTED	150,000.
TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA CLINICAL RESEARCH BUILDING, 7TH FLOOR 415 CURIE BOULEVARD, PHILADELPHIA, PA	UNRESTRICTED	137,500.
DANA HALL SCHOOL 45 DANA ROAD , WELLESLEY, MA 02482	UNRESTRICTED	250,000.
THE IACCOCA FOUNDATION 867 BOYLSTON STREET, 6TH FLOOR, BOSTON, MA 02116	UNRESTRICTED	578,150.
TOTAL TO FORM 990-PF, PART XV, LI	NE 3A	3,395,549.

FORM 990-PF

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STATEMENT

	FOR FUTURE PAYMENT		EMENT 13
RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT STATUS	AMOUNT
CRANBROOK SCHOOL 520 LONE PINE ROAD, P.O. BOX 801, BLOOMFIELD HILLS, MI 48303	UNRESTRICTED		10,000.
ST. SEBASTIANS SCHOOL 1191 GREENDALE AVENUE, NEEDHAM, MA 02492	UNRESTRICTED		125,000.
THE RONALD REAGAN PRESIDENTIAL FOUNDATION 40 PRESIDENTIAL DRIVE, SIMI VALLEY, CA 93065	UNRESTRICTED		25,000.
ST. SEBASTIANS 1191 GREENDALE AVENUE, NEEDHAM, MA 02492	UNRESTRICTED		125,000.
MARIAN HIGH SCHOOL 7225 LAHSER ROAD, BLOOMFIELD HILLS, MI 48301	UNRESTRICTED		40,000.
BETTY FORD CENTER 39000 BOB HOPE DRIVE, RANCHO MIRAGE, CA 92270	UNRESTRICTED		10,000.
YELLOWSTONE WOMENS 154 EAST BAY STREET, COSTA MESA, CA 92627	UNRESTRICTED		6,000.
BAYLOR COLLEGE OF MEDICINE ONE BAYLOR PLAZA, MS: BCM 160, HOUSTON, TX 77030	UNRESTRICTED		300,000.
MEDICAL COLLEGE OF WISCONSIN 8701 WATERTOWN PLANK ROAD, MILWAUKEE , WI 53226	UNRESTRICTED		78,190.

GRANTS AND CONTRIBUTIONS

IACOCCA FAMILY FOUNDATION		38-6071154
DANA-FARBER CANCER INSTITUTE 44 BINNEY STREET, BOSTON, MA 02115	UNRESTRICTED	169,950.
CHILDRENS HOSPITAL LOS ANGELES 4650 SUNSET BOULEVARD, MS 35, LOS U ANGELES, CA 90027	UNRESTRICTED	125,000.
MOUNT SINAI SCHOOL OF MEDICINE ONE GUSTAVE L. LEVY PLACE, NEW YORK, NY 10029	UNRESTRICTED	125,000.
MAYO CLINIC ROCHESTER 200 FIRST STREET SW, ROCHESTER, MN 55905	UNRESTRICTED	252,628.
UNIVERSITY OF MINNESOTA MEDICAL SCHOOL MMC 280, 420 DELAWARE STREET SE, MINNEAPOLIS, MN 55455	UNRESTRICTED	50,000.
REGENTS OF THE UNIVERSITY OF CALIFORNIA, SAN FRANCISCO 513 PARNASSUS AVENUE, SAN FRANCISCO, CA 94143	UNRESTRICTED	100,000.
UNIVERSITY OF VERMONT GIVEN BUILDING, C334A, BURLINGTON, VT 05405	UNRESTRICTED	99,999.
TRUSTEES OF THE UNIVERSITY OF PENNSYLVANIA CLINICAL RESEARCH BUILDING, 7TH FLOOR 415 CURIE BOULEVARD, PHILADELPHIA, PA	UNRESTRICTED	137,500.
DANA HALL SCHOOL 45 DANA ROAD , WELLESLEY, MA 02482	UNRESTRICTED	250,000.
TOTAL TO FORM 990-PF, PART XV, LIN	JE 3B	2,029,267.