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

2008

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

For calendar year 2008, or tax year beginning

, and ending

G Check all that apply ☐ Initial return ☐ Final return ☒ Amended return ☒ Address change ☐ Name changeUse the IRS
label.
Otherwise,
print
or type.
See Specific
Instructions.

Name of foundation

IACOCCA FAMILY FOUNDATION

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

867 BOYLSTON STREET, 6TH FLOOR

Room/suite

City or town, state, and ZIP code

BOSTON, MA 02116

A Employer identification number

38-6071154

B Telephone number

617-267-7747

C If exemption application is pending, check here ☐D 1. Foreign organizations, check here ☐2. Foreign organizations meeting the 85% test, check here and attach computation ☐E If private foundation status was terminated under section 507(b)(1)(A), check here ☐F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐H Check type of organization ☒ Section 501(c)(3) exempt private foundation☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundationI Fair market value of all assets at end of year
(from Part II, col. (c), line 16)

\$ 33,218,903. (Part I, column (d) must be on cash basis.)

J Accounting method ☐ Cash ☒ Accrual
☐ Other (specify)

Part I Analysis of Revenue and Expenses

(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a).)

	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1 Contributions, gifts, grants, etc., received	296,294.		N/A	
2 Check <input type="checkbox"/> If the foundation is not required to attach Sch. B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	1,765,513.	1,760,801.		STATEMENT 2
5a Gross rents				
b Net rental income or (loss)				
6a Net gain or (loss) from sale of assets not on line 10	<55,979.>			STATEMENT 1
b Gross sales price for all assets on line 6a	5,348,635.			
7 Capital gain net income (from Part IV, line 2)		0.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit or (loss)				
11 Other income				
12 Total. Add lines 1 through 11	2,005,828.	1,760,801.		
13 Compensation of officers, directors, trustees, etc.	272,500.	136,250.		136,250.
14 Other employee salaries and wages	100,709.	13,125.		87,584.
15 Pension plans, employee benefits	66,665.	20,643.		40,087.
16a Legal fees STMT 3	43,335.	6,500.		36,835.
b Accounting fees STMT 4	11,025.	1,654.		9,371.
c Other professional fees STMT 5	118,312.	56,583.		43,630.
17 Interest				
18 Taxes STMT 6	62,494.	7,895.		19,599.
19 Depreciation and depletion	4,642.	0.		
20 Occupancy	57,238.	8,586.		48,652.
21 Travel, conferences, and meetings	44,584.	22,292.		22,292.
22 Printing and publications	12,072.	1,811.		10,261.
23 Other expenses STMT 7	73,374.	11,006.		62,368.
24 Total operating and administrative expenses. Add lines 13 through 23	866,950.	286,345.		516,929.
25 Contributions, gifts, grants paid	4,924,816.			3,395,549.
26 Total expenses and disbursements. Add lines 24 and 25	5,791,766.	286,345.		3,912,478.
27 Subtract line 26 from line 12.				
a Excess of revenue over expenses and disbursements	<3,785,938.>			
b Net investment income (if negative, enter -0-)		1,474,456.		
c Adjusted net income (if negative, enter -0-)			N/A	

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Form 990-PF (2008)

Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	160,049.	36,994.	36,994.
	2 Savings and temporary cash investments	154,204.		
	3 Accounts receivable ▶ 165,868.			
	Less: allowance for doubtful accounts ▶	525,350.	165,868.	165,868.
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
	Liabilities	11 Investments - land, buildings, and equipment basis ▶		
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 8		46,684,602.	30,796,773.	30,796,773.
14 Land, buildings, and equipment basis ▶ 58,403.				
Less: accumulated depreciation STMT 9 ▶ 7,400.		5,517.	51,003.	51,003.
15 Other assets (describe ▶ STATEMENT 10)		3,245,454.	2,168,265.	2,168,265.
16 Total assets (to be completed by all filers)		50,775,176.	33,218,903.	33,218,903.
17 Accounts payable and accrued expenses			5,935.	
18 Grants payable		500,000.	2,029,267.	
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	500,000.	2,035,202.	
Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>	24 Unrestricted	50,275,176.	31,183,701.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances	50,275,176.	31,183,701.	
31 Total liabilities and net assets/fund balances	50,775,176.	33,218,903.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	50,275,176.
2 Enter amount from Part I, line 27a	2	<3,785,938.>
3 Other increases not included in 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 balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	31,183,701.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo, day, yr)	(d) Date sold (mo, day, yr)
1a PIMCO	P	06/28/04	01/03/08
b SECURITIES	P	01/01/08	12/31/08
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 715,000.		1,392,162.	<677,162.>
b 4,633,635.		4,012,452.	621,183.
c			
d			
e			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			<677,162.>
b			621,183.
c			
d			
e			

2 Capital gain net income or (net capital loss)	<div> If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 </div>	2	<55,979.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8		3	N/A

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income.)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e). Do not complete this part.

1 Enter the appropriate amount in each column for each year, see instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2007	2,864,325.	50,829,200.	.056352
2006	2,254,367.	48,076,542.	.046891
2005	2,386,322.	40,909,466.	.058332
2004	2,583,763.	39,402,007.	.065574
2003	1,235,373.	37,074,771.	.033321

2 Total of line 1, column (d)	2	.260470
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.052094
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5	4	41,882,815.
5 Multiply line 4 by line 3	5	2,181,843.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	14,745.
7 Add lines 5 and 6	7	2,196,588.
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions	8	3,962,606.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling letter: _____ (attach copy of ruling letter if necessary-see instructions)		1	14,745.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)		3	14,745.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
3 Add lines 1 and 2		5	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 Credits/Payments			
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a	73,282.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	73,282.	
8 Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	58,537.	
11 Enter the amount of line 10 to be Credited to 2009 estimated tax	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b 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.		X
1c Did the foundation file Form 1120-POL for this year?		X
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> MA, MI		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► IACOCCAFOUNDATION.ORG	13	X	
14	The books are in care of ► THE FOUNDATION Telephone no ► 617-267-7747 Located at ► 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	15		N/A

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here		X
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008?		X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008.)	N/A	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?		X

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☐**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?☐ Yes ☒ No**b** Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

6b

X

If you answered "Yes" to 6b, also file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 11		272,500.	33,705.	0.

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

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

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

0

Form 990-PF (2008)

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	40,032,459.
b	Average of monthly cash balances	1b	103,029.
c	Fair market value of all other assets	1c	2,385,136.
d	Total (add lines 1a, b, and c)	1d	42,520,624.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	42,520,624.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	637,809.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	41,882,815.
6	Minimum investment return. Enter 5% of line 5	6	2,094,141.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ☐ and do not complete this part.)

1	Minimum investment return from Part X, line 6	1	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	
c	Add lines 2a and 2b	2c	14,745.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	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 XIII, line 1	7	2,079,396.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	3,912,478.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	50,128.
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	3,962,606.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	14,745.
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 when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				2,079,396.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			0.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2008:				
a From 2003				
b From 2004	663,593.			
c From 2005	417,289.			
d From 2006				
e From 2007	407,925.			
f Total of lines 3a through e	1,488,807.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 3,962,606.				
a Applied to 2007, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2008 distributable amount				2,079,396.
e Remaining amount distributed out of corpus	1,883,210.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	3,372,017.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2007. Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2008 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2009				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2009. 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				
d Excess from 2007	407,925.			
e Excess from 2008	1,883,210.			

N/A

- b**
- Check box to indicate whether the foundation is a private operating foundation described in section

☐ 4942(I)(3) or ☐ 4942(I)(5)

- (4) Gross investment income**

[illegible]Form **990-PF** (2008)

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient		If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)					
a Paid during the year					
SEE STATEMENT 12					
Total				▶ 3a	3395549.
b Approved for future payment					
SEE STATEMENT 13					
Total				▶ 3b	2029267.

Part XVI-A

Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
1	Program service revenue					
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities			14	1,765,513.	
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory			18	<55,979.>	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory					
11	Other revenue					
a						
b						
c						
d						
e						
12	Subtotal. Add columns (b), (d), and (e)		0.		1,709,534.	0.
13	Total. Add line 12, columns (b), (d), and (e)				13 1,709,534.	

(See worksheet in line 13 instructions to verify calculations)

Part XVI-B

Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

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

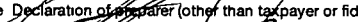

- | | | | |
|--|--------------|------------|-----------|
| <p>1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of</p> <p>(1) Cash</p> <p>(2) Other assets</p> <p>b Other transactions</p> <p>(1) Sales of assets to a noncharitable exempt organization</p> <p>(2) Purchases of assets from a noncharitable exempt organization</p> <p>(3) Rental of facilities, equipment, or other assets</p> <p>(4) Reimbursement arrangements</p> <p>(5) Loans or loan guarantees</p> <p>(6) Performance of services or membership or fundraising solicitations</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees</p> <p>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.</p> | | Yes | No |
| | | | |
| | 1a(1) | | X |
| | 1a(2) | | X |
| | | | |
| | 1b(1) | | X |
| | 1b(2) | | X |
| | 1b(3) | | X |
| | 1b(4) | | X |
| | 1b(5) | | X |
| | 1b(6) | | X |
| | 1c | | X |

[illegible]

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

b. If "Yes," complete the following schedule		
(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge.

<div style="writing-mode: vertical-rl; transform: rotate(180deg);">Sign Here</div>	 Signature of officer or trustee		9-1510 Date	PRESIDENT Title
	<div style="writing-mode: vertical-rl; transform: rotate(180deg);">Paid Preparer's Use Only</div>	Preparer's signature  THOMAS WASHBURN, CPA	Date 06/03/10	Check if self-employed <input type="checkbox"/>

Firm's name (or yours if self-employed), address, and ZIP code
 ALEXANDER, ARONSON, FINNING & CO., P.C.
 21 EAST MAIN STREET
 WESTBORO, MA 01581

Form **990-PF** (2008)

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

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

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

OMB No 1545-0047

2008

Name of the organization

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

☒ 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).

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990. These instructions will be issued separately.

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

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 <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
2	IACOCCA CLUT F/B/O PARKER LEE HENTZ C/O COMERICA BANK DETROIT, MI 48226	\$ 163,302.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

FORM 990-PF	GAIN OR (LOSS) FROM SALE OF ASSETS	STATEMENT	1
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(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
PIMCO	715,000.	1,392,162.	0.	0.	<677,162.>

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
SECURITIES	4,633,635.	4,012,452.	0.	0.	621,183.

CAPITAL GAINS DIVIDENDS FROM PART IV	0.
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TOTAL TO FORM 990-PF, PART I, LINE 6A	<55,979.>
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FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	2
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
COMERICA	2,032.	0.	2,032.
HALL	4,712.	0.	4,712.
SCHWAB	1,758,769.	0.	1,758,769.
TOTAL TO FM 990-PF, PART I, LN 4	1,765,513.	0.	1,765,513.

FORM 990-PF	LEGAL FEES	STATEMENT	3
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL	43,335.	6,500.		36,835.
TO FM 990-PF, PG 1, LN 16A	43,335.	6,500.		36,835.

FORM 990-PF	ACCOUNTING FEES	STATEMENT	4
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING	11,025.	1,654.		9,371.
TO FORM 990-PF, PG 1, LN 16B	11,025.	1,654.		9,371.

FORM 990-PF	OTHER PROFESSIONAL FEES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OTHER	118,312.	56,583.		43,630.
TO FORM 990-PF, PG 1, LN 16C	118,312.	56,583.		43,630.

FORM 990-PF	TAXES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	35,000.	0.		0.
PAYROLL TAXES	22,061.	7,895.		14,166.
REAL ESTATE TAXES	5,433.	0.		5,433.
TO FORM 990-PF, PG 1, LN 18	62,494.	7,895.		19,599.

FORM 990-PF

OTHER EXPENSES

STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
SUPPLIES	9,219.	1,383.		7,836.
TELEPHONE	10,794.	1,619.		9,175.
POSTAGE, SHIPPING & DELIVERY	4,272.	641.		3,631.
INSURANCE	28,176.	4,226.		23,950.
OUTSIDE COMPUTER SERVICES	2,927.	439.		2,488.
PAYROLL PROCESSING FEES	2,481.	372.		2,109.
STORAGE	5,883.	882.		5,000.
MEALS	9,054.	1,358.		7,696.
REPAIRS	450.	68.		383.
MISCELLANEOUS	118.	18.		100.
TO FORM 990-PF, PG 1, LN 23	73,374.	11,006.		62,368.

FORM 990-PF

OTHER INVESTMENTS

STATEMENT 8

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCKS AND BONDS FUND	COST	26,496,478.	26,496,478.
CASH AND MONEY MARKET FUNDS	COST	4,300,295.	4,300,295.
TOTAL TO FORM 990-PF, PART II, LINE 13		30,796,773.	30,796,773.

FORM 990-PF

DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT

STATEMENT 9

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
EQUIPMENT	58,403.	7,400.	51,003.
TOTAL TO FM 990-PF, PART II, LN 14	58,403.	7,400.	51,003.

FORM 990-PF	OTHER ASSETS	STATEMENT	10
DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
CSV LIFE INSURANCE POLICY	1,612,652.	1,692,888.	1,692,888.
REAL ESTATE REAL RETURN FUND	1,632,802.	475,377.	475,377.
TO FORM 990-PF, PART II, LINE 15	3,245,454.	2,168,265.	2,168,265.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	11
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	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.

DAÑA A. BALL 867 BOYLSTON STREET, 6TH FLOOR BOSTON, MA 02116	FORMER EXECUTIVE DIRECTOR 20.00	72,500.	7,425.	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.
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FORM 990-PF	GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR	STATEMENT 12
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RECIPIENT NAME AND ADDRESS	RECIPIENT RELATIONSHIP AND PURPOSE OF GRANT	RECIPIENT 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 PROGRAM AFRICA		23,140.
THE HARVARD SCHOOL OF PUBLIC HEALTH 124 MT. AUBURN STREET, CAMBRIDGE, MA 02138	RESTRICTED FOR SPRING 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 GLOBAL VILLAGE		19,500.

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

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

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	RESTRICTED 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.

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.

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	UNRESTRICTED 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.

THE CAROUSEL OF HOPE / CHILDRENS DIABETES 777 GRANT STREET.SUITE 302, DENVER, CO 80203	UNRESTRICTED	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	RESTRICTED FOR THE HOLLYWOOD BAG LADIES LUNCHEON	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.

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 MIRIAM'S 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.

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.

EASTERN VIRGINIA MEDICAL COLLEGE
BOX 801405 ARBACH BUILDING, ROOM UNRESTRICTED
1221, CHARLOTESVILLE, VA 22908

150,000.

TRUSTEES OF THE UNIVERSITY OF
PENNSYLVANIA
CLINICAL RESEARCH BUILDING, 7TH UNRESTRICTED
FLOOR 415 CURIE BOULEVARD,
PHILADELPHIA, PA

137,500.

DANA HALL SCHOOL
45 DANA ROAD , WELLESLEY, MA UNRESTRICTED
02482

250,000.

THE IACCOCA FOUNDATION
867 BOYLSTON STREET, 6TH FLOOR, UNRESTRICTED
BOSTON, MA 02116

578,150.

TOTAL TO FORM 990-PF, PART XV, LINE 3A

3,395,549.

FORM 990-PF

GRANTS AND CONTRIBUTIONS
APPROVED FOR FUTURE PAYMENT

STATEMENT 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.

DANA-FARBER CANCER INSTITUTE 44 BINNEY STREET, BOSTON, MA 02115	UNRESTRICTED	169,950.
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	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, LINE 3B

2,029,267.