C1SKN9CDMZ

Form **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

200912

OMB No. 1545-0052

2009

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

For calendar year 2009, or tax year beginning , and ending

G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation: SECCHIA FAMILY FOUNDATION

Number and street (or P O. box number if mail is not delivered to street address): 220 LYON SQ. NW — Room/suite: 510

City or town, state, and ZIP code: GRAND RAPIDS MI 49503

A Employer identification number: 38-2641093

B Telephone number (see page 10 of the instructions): 616-235-0010

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐

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

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

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

H Check type of organization: ☐ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☒ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ $ 12,062,427

J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) (Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions).)

		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue 1	Contributions, gifts, grants, etc., received (attach schedule)	100,000			
2	Check ▶ ☐ if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	282,097	281,362	282,097	
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10 STMT 1	-1,627,905			
b	Gross sales price for all assets on line 6a 5,911,379				
7	Capital gain net income (from Part IV, line 2)		3,742		
8	Net short-term capital gain			0	
9	Income modifications				
10a	Gross sales less returns & allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	**Total.** Add lines 1 through 11	-1,245,808	285,104	282,097	
Operating and Administrative Expenses 13	Compensation of officers, directors, trustees, etc				
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule) SEE STMT 2	11,559	5,779		5,780
b	Accounting fees (attach schedule) STMT 3	3,500	1,750		1,750
c	Other professional fees (attach schedule) STMT 4	65,317	32,659		32,658
17	Interest				
18	Taxes (attach schedule) (see page 14 of the instructions) STMT 5	3,000			
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (att. sch.) STMT 6	783	783		
24	**Total operating and administrative expenses.** Add lines 13 through 23	84,159	40,971		40,188
25	Contributions, gifts, grants paid	542,650			542,650
26	**Total expenses and disbursements.** Add lines 24 and 25	626,809	40,971	0	582,838
27	Subtract line 26 from line 12:				
a	**Excess of revenue over expenses and disbursements**	-1,872,617			
b	**Net investment income** (if negative, enter -0-)		244,133		
c	**Adjusted net income** (if negative, enter -0-)			282,097	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only. (See instructions.)

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing	73,994	150,808	150,808
	2	Savings and temporary cash investments	489,951		
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 16 of the instructions)			
	7	Other notes and loans receivable (att. schedule) ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments—U.S. and state government obligations (attach schedule) STMT 7	11,691,151	10,091,346	11,731,019
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach sch.) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)			
	14	Land, buildings, and equipment: basis ▶			
		Less: accumulated depreciation (attach sch.) ▶			
	15	Other assets (describe ▶ SEE STATEMENT 8)	134,140	134,140	180,600
	16	Total assets (to be completed by all filers—see the instructions. Also, see page 1, item I)	12,389,236	10,376,294	12,062,427
Liabilities	17	Accounts payable and accrued expenses	2,825		
	18	Grants payable	550,000	412,500	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	Total liabilities (add lines 17 through 22)	552,825	412,500	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	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	11,836,411	9,963,794	
	30	Total net assets or fund balances (see page 17 of the instructions)	11,836,411	9,963,794	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	12,389,236	10,376,294	

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	11,836,411
2	Enter amount from Part I, line 27a	2	-1,872,617
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	9,963,794
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	9,963,794

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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				
b				
c				
d				
e				

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	3,742			3,742
b				
c				
d				
e				

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

	(i) F.M.V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col (j), if any	(l) Gains (Col (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				3,742
b				
c				
d				
e				

2	Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7 }	2	3,742
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions). If (loss), enter -0- in Part I, line 8	3	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

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

1 Enter the appropriate amount in each column for each year; see page 18 of the 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))
2008	658,180	12,214,258	0.053886
2007	710,151	14,564,297	0.048760
2006	638,443	14,242,034	0.044828
2005	530,100	12,727,816	0.041649
2004	602,726	12,231,540	0.049276

2	Total of line 1, column (d)	2	0.238399
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.047680
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	10,870,191
5	Multiply line 4 by line 3	5	518,291
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	2,441
7	Add lines 5 and 6	7	520,732
8	Enter qualifying distributions from Part XII, line 4	8	582,838

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 on page 18.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: .... (attach copy of letter if necessary—see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ [X] and enter 1% of Part I, line 27b	1	2,441
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	2,441
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	2,441
6	Credits/Payments:		
a	2009 estimated tax payments and 2008 overpayment credited to 2009 — 6a: 4,744		
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	4,744
8	Enter any **penalty** for underpayment of estimated tax. Check here [X] if Form 2220 is attached	8	3
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	2,300
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶ 2,300 **Refunded** ▶	11	

Part VII-A Statements Regarding Activities

			Yes	No
1a	During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		X
	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 file Form 1120-POL for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ ____ (2) On foundation managers ▶ $ ____			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ ____			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.	2		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	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If "Yes," has it filed a tax return on Form 990-T for this year? N/A	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.	5		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?	6	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	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ▶ 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	8b	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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		X
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

Part VII-A Statements Regarding Activities (continued)

			Yes	No
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 page 20 of the 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?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ MARK A. SCHUT CPA Telephone no. ▶ 616-735-3052
4575 LAKE MICHIGAN DR NW
Located at ▶ GRAND RAPIDS, MI ZIP+4 ▶ 49534

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

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

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

			Yes	No
1a	During the year did the foundation (either directly or indirectly):			
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person? ☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? ☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? ☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? ☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? ☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.) ☐ Yes ☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2009? N/A	1c		
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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No			
	If "Yes," list the years ▶ 20 , 20 , 20 , 20			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see page 20 of the instructions.) N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶ 20 , 20 , 20 , 20			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If "Yes," did it have excess business holdings in 2009 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 2009.) N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		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 2009?	4b		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)? (see page 22 of the instructions) ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see page 22 of the 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? N/A ☐ 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** No: X

If "Yes" to 6b, 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 (see page 22 of the instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
PETER F. SECCHIA GRAND RAPIDS 220 LYON NW, STE 510 MI 49503	PRESIDENT 1.00	0	0	0
JAMES A. ENS GRAND RAPIDS 220 LYON NW, STE 510 MI 49503	SECRETARY 0.50	0	0	0
MARK A. SCHUT GRAND RAPIDS 220 LYON NW, STE 510 MI 49503	TREASURER 1.00	0	0	0

2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."

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

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

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

3 Five highest-paid independent contractors for professional services (see page 23 of the instructions). If none, enter "NONE."

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over $50,000 for professional services ▶

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 DEVOS CHILDREN'S HOSPITAL PROVIDED FUNDING FOR HOSPITAL EXPANSION	100,000
2 SEE STATEMENT 9	75,000
3 MICHIGAN STATE UNIVERSITY ATHLETIC DEPT TRAVEL FUNDING SUPPORT	50,000
4 VAN ANDEL INSTITUTE CAPITAL CAMPAIGN FOR CANCER RESEARCH FACILITY	50,000

Part IX-B Summary of Program-Related Investments (see page 24 of the instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See page 24 of the instructions 3	
Total. Add lines 1 through 3 ▶	

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Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	10,839,556
b	Average of monthly cash balances	1b	23,894
c	Fair market value of all other assets (see page 24 of the instructions)	1c	172,277
d	Total (add lines 1a, b, and c)	1d	11,035,727
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	11,035,727
4	Cash deemed held for charitable activities Enter 1½ % of line 3 (for greater amount, see page 25 of the instructions)	4	165,536
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	10,870,191
6	**Minimum investment return.** Enter 5% of line 5	6	543,510

Part XI Distributable Amount (see page 25 of the 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	543,510
2a	Tax on investment income for 2009 from Part VI, line 5	2a	2,441		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	2,441
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	541,069
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	541,069
6	Deduction from distributable amount (see page 25 of the instructions)			6	
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	541,069

Part XII Qualifying Distributions (see page 25 of the 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	582,838
b	Program-related investments—total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	582,838
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b (see page 26 of the instructions)	5	2,441
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	580,397

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.

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Part XIII Undistributed Income (see page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				541,069
2 Undistributed income, if any, as of the end of 2009:				
a Enter amount for 2008 only			197,653	
b Total for prior years: 20 ____ , 20 ____ , 20 ____				
3 Excess distributions carryover, if any, to 2009:				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e				
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ $ 582,838				
a Applied to 2008, but not more than line 2a			197,653	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions)				
d Applied to 2009 distributable amount				385,185
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)				
6 **Enter the net total of each column as indicated below:**				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount—see page 27 of the instructions				
e Undistributed income for 2008. Subtract line 4a from line 2a. Taxable amount—see page 27 of the instructions				
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				155,884
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions)				
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a "Assets" alternative test—enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c "Support" alternative test—enter:					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the foundation had $5,000 or more in assets at any time during the year—see page 28 of the instructions.)

1 *Information Regarding Foundation Managers:*

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

N/A

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

N/A

2 *Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:*

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds If the foundation makes gifts, grants, etc (see page 28 of the instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

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

N/A

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

N/A

c Any submission deadlines:

N/A

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

N/A

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a Paid during the year SEE STATEMENT 10				542,650
Total			▶ 3a	542,650
b Approved for future payment N/A				
Total			▶ 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (d) Amount	(e) Related or exempt function income (See page 28 of the instructions.)
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	282,097	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			14	3,742	-1,631,647
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		285,839	-1,631,647

13 Total. Add line 12, columns (b), (d), and (e) . . . 13 -1,345,808

(See worksheet in line 13 instructions on page 28 to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See page 29 of the instructions.)
N/A	

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

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

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

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

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		

Sign Here

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

Signature of officer or trustee: [signature] Date: 6-15-11 Title: PRESIDENT

signature CIS IMAGE Do not correspond

Paid Preparer's Use Only

Preparer's signature: MARK A SCHUT [signature] Date: 6-15-11 Check if self-employed ☐ Preparer's identifying number (see Signature on page 30 of the instructions): P00006430

Firm's name (or yours if self-employed), address, and ZIP code: H&S COMPANIES, P.C. 4575 LAKE MICHIGAN DR NW GRAND RAPIDS, MI 49534 EIN 38-2563599 Phone no. 616-453-8551

DAA

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, or 990-PF.

OMB No. 1545-0047

2009

Name of the organization

SECCHIA FAMILY FOUNDATION

Employer identification number

38-2641093

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 an organization 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 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 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 (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions 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 990-EZ that received from any one contributor, during the year, 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. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box in the heading of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization
SECCHIA FAMILY FOUNDATION

Employer identification number
38-2641093

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	SIBSCO, LLC 220 LYON NW SUITE 510 GRAND RAPIDS MI 49503	$ 100,000	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution.)

Statement 1 - Form 990-PF, Part I, Line 6a - Sale of Assets

Description: Whom Sold	Date Acquired	Date Sold	How Received	Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
SEE ATTACHED SCHEDULE	VARIOUS	VARIOUS	PURCHASE	$ 54	$ 54	$	$	$
SEE ATTACHED SCHEDULE	VARIOUS	VARIOUS	PURCHASE	478,794	481,354			-2,560
SEE ATTACHED SCHEDULE	VARIOUS	VARIOUS	PURCHASE	1,902,698	2,008,887			-106,189
SEE ATTACHED SCHEDULE	VARIOUS	VARIOUS	PURCHASE	2,249	2,249			
SEE ATTACHED SCHEDULE	VARIOUS	VARIOUS	PURCHASE	18,959	47,144			-28,185
SEE ATTACHED SCHEDULE	VARIOUS	VARIOUS	PURCHASE	889,183	1,034,115			-144,932
SEE ATTACHED SCHEDULE	VARIOUS	VARIOUS	PURCHASE	2,598,827	3,924,174			-1,325,347
SEE ATTACHED SCHEDULE	VARIOUS	VARIOUS	PURCHASE	16,873	41,307			-24,434
TOTAL				$ 5,907,637	$ 7,539,284	$ 0	$ 0	$ -1,631,647

Statement 2 - Form 990-PF, Part I, Line 16a - Legal Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MIKA MEYERS BECKETT & JONES	$ 11,559	$ 5,779	$	$ 5,780
TOTAL	$ 11,559	$ 5,779	$ 0	$ 5,780

Statement 3 - Form 990-PF, Part I, Line 16b - Accounting Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
MARK A. SCHUT CPA PLC	$ 3,500	$ 1,750	$	$ 1,750
TOTAL	$ 3,500	$ 1,750	$ 0	$ 1,750

Statement 4 - Form 990-PF, Part I, Line 16c - Other Professional Fees

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
NORRIS PERNE & FRENCH	$ 25,347	$ 12,674	$	$ 12,673
LEGACY TRUST BANK	38,210	19,105		19,105
WACHOVIA SECURITIES	1,760	880		880
TOTAL	$ 65,317	$ 32,659	$ 0	$ 32,658

Statement 5 - Form 990-PF, Part I, Line 18 - Taxes

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
INCOME TAX	$ 3,000	$	$	$
TOTAL	$ 3,000	$ 0	$ 0	$ 0

Statement 6 - Form 990-PF, Part I, Line 23 - Other Expenses

Description	Total	Net Investment	Adjusted Net	Charitable Purpose
	$	$	$	$
EXPENSES				
BANK CHARGES	359	359		
MISCELLANEOUS	424	424		
TOTAL	$ 783	$ 783	$ 0	$ 0

Statement 7 - Form 990-PF, Part II, Line 10a - US and State Government Investments

Description	Beginning of Year	End of Year	Basis of Valuation	Fair Market Value
UNIVERSAL FOREST PRODUCTS	$ 563,603	$ 563,603		$ 1,161,356
NORRIS PERNE & FRENCH	5,019,560	4,785,286		4,969,067
WACHOVIA SECURITIES	6,107,988			
LEGACY TRUST 4700		3,381,865		4,006,879
LEGACY TRUST 4701		1,360,592		1,593,717
TOTAL	$ 11,691,151	$ 10,091,346		$ 11,731,019

Statement 8 - Form 990-PF, Part II, Line 15 - Other Assets

Description	Beginning of Year	End of Year	Fair Market Value
LIFE INSURANCE	$ 134,140	$ 134,140	$ 180,600
TOTAL	$ 134,140	$ 134,140	$ 180,600

Statement 9 - Form 990-PF, Part IX-A, Line 2 - Summary of Direct Charitable Activities

Description
GRAND RAPIDS COMMUNITY LEGENDS PROVIDED FUNDING FOR COMPLETION OF STATUARY TO MEMORIALIZE KEY LEADERS OF THE GRAND RAPIDS COMMUNITY AND HISTORICAL FIGURES THAT HAVE AN HISTORICAL INTEREST TO THE COMMUNITY.

Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year

Name / Address	Address / Relationship	Status	Purpose	Amount
AMERICAN CANCER SOCIETY GRAND RAPIDS MI 49504	400 ANN ST NW NONE	PUBLIC	CATTLE BARONS 2008	1,000
AMERICAN LEGION GRAND RAPIDS MI 49525	401 N. PARK ST NW NONE	PUBLIC	GIFT	100
AMERICAN RED CROSS GRAND RAPIDS MI 49505	1050 FULLER AVE NE NONE	PUBLIC	GIFT	1,000
BAXTER COMMINITY CENTER GRAND RAPIDS MI 49506	935 BAXTER SE NONE	PUBLIC	YEAR END GIFT	1,000
BOYS & GIRLS CLUB OF GR Y GRAND RAPIDS MI 49504	235 STRAIGHT AVE NW NONE	PUBLIC	CAMP OMALLEY	4,500
BROADWAY THEATER GUILD GRAND RAPIDS MI 49503	122 LYON ST NW NONE	PUBLIC	BROADWAY IN EDUCATION SCHOLARSHIP 08	10,000
CELEBRATION ON THE GRAND GRAND RAPIDS MI 49503	P.O. BOX 230914 NONE	PUBLIC	GIFT	1,000
CITY OF GRAND RAPIDS GRAND RAPIDS MI 49503	300 MONROE AVE NW NONE	PUBLIC	POOL ADMISSION SPONSORSHIP	5,000
CLOSE UP FOUNDATION GRAND RAPIDS MI 49525	2930 KNAPP NE NONE	PUBLIC	CLOSE UP WASHINGTON	1,000
CROHN'S & COLITIS NEW YORK NY 10016	386 PARK AVE S NONE	PUBLIC	TAKE STEPS WALK 2009	500
DISABILITY ADVOCATES OF K GRAND RAPIDS MI 49546	3600 CAMELOT SE NONE	PUBLIC	GIFT	1,000
EGR SCHOOL FOUNDATION GRAND RAPIDS MI 49506	2915 HALL ST SE NONE	PUBLIC	JIMMY GERKEN FUND	3,700
EWINGS REARCH FNDG CARY NC 27513	106 TOWERVIEW CT NONE	PUBLIC	MEMORIAL	2,000
F MEIJER GARDENS GRAND RAPIDS MI 49525	1000 EAST BELTLINE NE NONE	PUBLIC	SPEAKER SERIES	20,000
FEED THE CHILDREN OKLAHOMA CITY OK 73101	PO BOX 36 NONE	PUBLIC	CHILDREN'S PROJECT	1,000
FNDN FOR THE ED OF YOUNG ADDISON TX 75001	15303 DALLAS PARKWAY NONE	PUBLIC	LEE POSEY MEMORIAL	1,000
FRESH AIR FUND NEW YORK NY 10017	633 THIRD AVE NONE	PUBLIC	YOUTH CAMPER SUPPORT	4,000
FRIENDS OF CRESCENT PARK GRAND RAPIDS MI 49503	333 BOSTWICK NE NONE	PUBLIC	PARK IMPROVEMENT	5,000
FRIENDS OF GR PARKS GRAND RAPIDS MI 49502	P.O. BOX 3199 NONE	PUBLIC	YEAR END GIFT	1,000

Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship	Status	Purpose	Amount
GERALD R. FOLD COUNCIL GRAND RAPIDS MI 49544	3213 WALKER AVE NW NONE	PUBLIC	YEAR END GIFT	2,500
GERALD R. FORD FOUNDATION GRAND RAPIDS MI 49504	303 PEARL ST NW NONE	PUBLIC	WASHINGTON DC ANNUAL	5,000
GIRL SCOUTS OF MICH TRAIL GRAND RAPIDS MI 49544	3275 WALKER NW NONE	PUBLIC	GIRL SCOUTS	1,000
GIRLS CHORAL ACADEMY GRAND RAPIDS MI 49505	2920 FULLER NE SUITE 104 NONE	PUBLIC	SCHOLARSHIPS	500
GR COMM COLLEGE FNDN GRAND RAPIDS MI 49503	143 BOSTWICK AVE NE NONE	PUBLIC	INST FOR CULINARY ARTS	11,000
GR COMMUNITY LEGENDS GRAND RAPIDS MI 49503	220 LYON NW NONE	PUBLIC	2009 GIFTS	97,000
GR NAACP BALTIMORE MD 21215	4805 MT. HOPE DRIVE NONE	PUBLIC	MI BRANCH ED DEPT	100
GR SYMPHONY GRAND RAPIDS MI 49503	300 OTTAWA AVE NW NONE	PUBLIC	YEAR END	1,000
GR WHEELCHAIR SPORTS ASSO GRAND RAPIDS MI 49503	235 WEALTHY STREET SE NONE	PUBLIC	GIFT	1,000
GRAND HAVEN AREA COMM FND GRAND HAVEN MI 49417	1 SOUTH HARBOR NONE	PUBLIC	25TH ANNIV BOARDWALK	1,000
GRAND RAPIDS CHAMBER FNDS GRAND RAPIDS MI 49503	111 PEARL ST NW NONE	PUBLIC	GREATER TOGETHER	5,000
GRAND RAPIDS COMM COLLEGE GRAND RAPIDS MI 49503	143 BOSTWICK AVE NE NONE	PUBLIC	VI WONDERGEM SCHOLARSHIP FUND	10,000
GRAND RAPIDS FOUNDATION GRAND RAPIDS MI 49503	185 OAKES STREET SW NONE	PUBLIC	GRPD AWARDS PROGRAM	1,000
GRAND RAPIDS URBAN LEAGUE GRAND RAPIDS MI 49503	745 EASTERN AVENUE SE NONE	PUBLIC	GENERAL FUND	600
GRAND VALLEY STATE UNIVER ALLENDALE MI 49401	1 CAMPUS DRIVE NONE	PUBLIC	SPEAKER SERIES GIFT - 2008	13,000
HARDERWYK MINISTRIES HOLLAND MI 49424	1627 W. LAKEWOOD BLVD NONE	PUBLIC	SO AFRICA TRIP	100
HEART OF UNITED WAY WEST GRAND RAPIDS MI 49503	118 COMMERCE AVENUE SW NONE	PUBLIC	GIFT	5,000
HELEN DEVOS CHLDR HOSP. GRAND RAPIDS MI 49503	100 MICHIGAN ST NE NONE	PUBLIC	HOSPITAL CAPITAL CAMPAIGN	110,000
HOPE NETWORK FOUNDATION GRAND RAPIDS MI 49518	PO BOX 890 NONE	PUBLIC	TAKING PRIDE IN HOPE - 4 OF 5	5,000

Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship	Status	Purpose	Amount
HUGH MICHAEL BEAHAN FNDN GRAND RAPIDS MI 49503	302 SHELDON BLVD SE NONE	PUBLIC	WORLD OF MIRACLES	1,250
JAMIE HALE MEMORIAL TRUST GRAND RAPIDS MI 49507	1950 S DIVISION NONE	PUBLIC	MEMORIAL FUND DONATION	100
JENISON PUBLIC SCHOOLS JENISON MI 49428	2140 BAUER RD. NONE	PUBLIC	LIBRARY/ MUSIC	1,500
JOHN BALL ZOO GRAND RAPIDS MI 49501	1300 W. FULTON ST NONE	PUBLIC	FOOD/ MEDICINE	1,000
JUNIOR ACHIEVEMENT GRAND RAPIDS MI 49512	3665 28TH ST SE NONE	PUBLIC	WM BUSINESS HALL OF FAME	1,000
KENT CO. AG PRESERVATION GRAND RAPIDS MI 49503	185 OAKES ST SW NONE	PUBLIC	GIFT	250
KIDS FOOD BASKET GRAND RAPIDS MI 49504	1203 BUTTERWORTH SW NONE	PUBLIC	FOOD GIFT	2,000
MACINAC CENTER MIDLAND MI 48640	140 WEST MAIN ST NONE	PUBLIC	YEAR END	5,000
MAKE A WISH FOUNDATION GRAND RAPIDS MI 49525	2900 E. BELTLINE AVE NE NONE	PUBLIC	2009 GALA SPONSOR	1,000
MEL TROTTER MINISTRIES GRAND RAPIDS MI 49503	225 COMMERCE SW NONE	PUBLIC	FOOD APPEAL	1,000
MICH COMM BLOOD CENTER GRAND RAPIDS MI 49503	1036 FULLER AVE NE NONE	PUBLIC	NATIONAL MARROW DONOR PROGRAM	1,000
MICHIGAN STATE UNIVERSITY EAST LANSING MI 48824	JENISON FIELD HOUSE NONE	PUBLIC	ATHLETICS	67,500
ML KING ACADEMY FOOD DRIV GRAND RAPIDS MI 49512	5512 GLENWOOD HILLS PKWY NONE	PUBLIC	FOOD DRIVE	1,000
MICHIGAN STATE UNIV MPLP EAST LANSING MI 48824	JENISON FIELD HOUSE NONE	PUBLIC	SPONSOR	5,000
MSU ALUMNI CLUB SPRING LAKE MI 49456	16441 HARDWOOD LANE NONE	PUBLIC	BAND PROGRAM	3,000
NEUROFIBROMATOSIS SUPPORT GRAND RAPIDS MI 49503	230 MICHIGAN ST NE NONE	PUBLIC	WALK WITH GRACE BENEFIT	5,000
NIAF WASHINGTON DC 20009	1860 19TH ST NW NONE	PUBLIC	MEMBERSHIP	1,000
NORTH BANK COMMUNITIES FU GRAND HAVEN MI 49417	ONE SOUTH HARBOR DRIVE NONE	PUBLIC	YEAR END GIFT	1,000
CITY OF OCEAN RIDGE OCEAN RIDGE FL 33435	6450 N. OCEAN BLVD NONE	PUBLIC	POLICE DEPT	1,000

Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship	Status	Purpose	Amount
OPERA GRAND RAPIDS GRAND RAPIDS MI 49503	161 OTTAWA NW NONE	PUBLIC	BETTY VAN ANDEL OPERA CENTER	13,500
ORDER OF HIBERNIANS GRAND RAPIDS MI 49516	P.O. BOX 6002 NONE	PUBLIC	PARADE SPONSOR	100
ORDER SONS IF ITALY IN AM GRAND RAPIDS MI 49501	P.O. BOX 2865 NONE	PUBLIC	THANKSGIVING	100
ORIENTAL INSTITUTE CHICAGO IL 60637	1155 EAST 58TH STREET NONE	PUBLIC	GIFT FOR 2009	3,500
PEOPLE TO PEOPLE ROCKFORD MI 49341	2867 RIVERWOODS NONE	PUBLIC	CHINA TRIP	100
PUBLIC MUSEUM OF GRAND RA GRAND RAPIDS MI 49504	272 PEARL ST NW NONE	PUBLIC	GRANDPARENTS CLUB	500
ROTARY CHARITIES FOUNDATI GRAND RAPIDS MI 49505	1345 MONROE NW NONE	PUBLIC	NEW YEARS	1,000
ROTARY EAST GRAND RAPIDS MI 49503	161 OTTAWA AVE NW NONE	PUBLIC	36TH ANNUAL ANTIQUE FAIR	100
ROTARY FOUNDATION GRAND RAPIDS MI 49505	1345 MONROE NW NONE	PUBLIC	GIFT	1,000
SANTA CLAUS GIRLS GRAND RAPIDS MI 49503	155 MICHIGAN NW NONE	PUBLIC	GIFT	1,000
SEATTLE GIRLS SCHOOL SEATTLE WA 98144	2706 S. JACKSON ST NONE	PUBLIC	GENERAL FUND	4,000
SENIOR NEIGHBORS GRAND RAPIDS MI 49503	820 MONROE AVE NW NONE	PUBLIC	GIFT	1,500
SHINSKI ORPHANAGE LANSING MI 48911	6035 EXECUTIVE DR NONE	PUBLIC	GIFT	1,000
SPECIAL OLYMPICS MICHIGAN ALMA MI 48801	PO BOX 474 NONE	PUBLIC	BASKETBALL SPONSOR	5,000
ST. CECILIA MUSIC SOCIETY GRAND RAPIDS MI 49503	24 RANSOM NE NONE	PUBLIC	GIFT	550
STANFORD TEACHER ED PRGM STANFORD CA 94305	520 GALVEZ MALL NONE	PUBLIC	TEACHER EDUCATION	1,000
STEEPLETOWN TASTE THE WES GRAND RAPIDS MI 49504	671 DAVIS NW NONE	PUBLIC	CHALLENGE GRANT - PLAZA COMUNITARIA	1,000
STUDENT ADVANCEMENT FOUND GRAND RAPIDS MI 49503	111 LIBRARY NE NONE	PUBLIC	SUSTAINABILITY FUND	15,500
UICA GRAND RAPIDS MI 49503	120 LYON NW NONE	PUBLIC	COMTEMP ARTS	5,000

Statement 10 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name / Address	Address / Relationship	Status	Purpose	Amount
VAN ANDEL INSTITUTE GRAND RAPIDS MI 49503	333 BOSTWICK AVE NE NONE	PUBLIC	BRINGING HOPE TO LIFE	50,000
W.M. STRATEGIC ALLIANCE GRAND RAPIDS MI 49506	951 WEALTHY STREET SE NONE	PUBLIC	INTERNS PROJECT	1,000
YOUTH COMMONWEALTH GRAND RAPIDS MI 49501	1331 FRANKLIN ST SE NONE	PUBLIC	BOYS & GIRLS TOWN	1,000
YOUTH TUTORING PROGRAM OF GRAND RAPIDS MI 49503	1425 MICHIGAN ST NE NONE	PUBLIC	YEAR END GIFT - SSA	2,000
TOTAL				542,650

As of Date: 2/05/10

Account Number: 7535-7178
SECCHIA FAMILY FOUNDATION HP11
MICHIGAN NON-PROFIT CORP
PETER F SECCHIA PRESIDENT

Important Realized Gain/Loss Information

This information is provided for courtesy purposes only. Each individual taxpayer should consult with a tax advisor as to any additional reporting requirements or adjustments. NO COST BASIS OR REALIZED GAIN/LOSS INFORMATION IS PROVIDED TO THE IRS, NOR IS THIS INFORMATION VERIFIED OR GUARANTEED BY FIRST CLEARING, LLC TO BE ACCURATE FOR EACH TAXPAYER'S UNIQUE REPORTING REQUIREMENTS. THEREFORE, YOU SHOULD NEVER ASSUME THIS STATEMENT IS ACCURATE IN LIEU OF COMPLETING SCHEDULE D OF YOUR TAX RETURN AND CONSULTING WITH YOUR TAX ADVISOR.

Federal tax reporting requirements will create differences between the information presented here and what appears on your Form 1099-B, including but not limited to the following situations:

* Cost basis for many fixed income tax lots has been amortized (for securities purchased at a premium) or accreted (for securities purchased at a discount), when possible, for applicable securities. For securities that were purchased at an Original Issue Discount (OID), only those positions whose cost basis has been adjusted will reflect the impacts of the OID accruals on the original cost basis. The original issue discount amount reported on your Form 1099-OID is not adjusted for market discount, acquisition premium or bond premium. Therefore, the amortization and accretion adjustments used on this statement may not be consistent with the Form 1099-OID amount because the reporting requirements on the Form 1099-OID are different.
* The Original Price represents the unadjusted price of the security. The Original Price can be used to calculate the original unadjusted cost of the security.
* Short sales are reportable on Form 1099-B before the position is closed.
* Implicit redemptions by the issuer of a structured product are reportable on Form 1099-B, but will not appear on the Realized Gain/Loss Statement if that implicit redemption did not result in a closed tax lot at that time.
* Securities subject to marked to market reporting requirements for those investors are not included here nor is that information available on our systems.
* Long-term capital gains reported by a RIC or REIT appear on Form 1099-DIV only, as noted in the instructions for that form.
* Lots closed due to transfers or journals will not be reflected in the Realized Gain/Loss Statement, or on the Form 1099-B.

Realized Gain/Loss Summary	THIS YEAR GAIN	THIS YEAR LOSS	THIS YEAR NET
Short term	0.00	0.00	0.00
Long term	0.00	0.00	0.00
Total - Realized Gain/Loss	$0.00	$0.00	$0.00

Realized Gain/Loss Detail for Year

Short Term

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	DATE ACQUIRED	CLOSE DATE	PROCEEDS	ADJ COST/ ORIG COST	GAIN/LOSS
GOLDMAN SACHS TR FINL SQUARE MMKT FD CL I	53.8300	1.0000	02/01/08	01/09/09	53.83	53.83	0.00
Total - Short Term					$53.83	$53.83	$0.00

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Fidelity INVESTMENTS

2009 Supplemental Information		
Account No.	Taxpayer ID.	Page
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THE SECCHIA FAMILY FOUNDATION
396SF
220 LYON ST NW STE 510
GRAND RAPIDS MI 49503-2210

Customer Service: 616-459-3421

Detail Information — Short-Term Realized Gain/Loss

Cost basis, realized gain and loss, and holding period information reported may not reflect all adjustments necessary for tax reporting purposes. This information is not reported to the IRS. It may assist you in tax return preparation.

Description / CUSIP Date Acquired	Date Sold	Quantity	Proceeds	Cost Basis	Gain/Loss (-)
FEDERAL HOME LN MTG CORP 6.20000% /3128X6DX1					
08/14/08	06/26/09	100,000.000	100,000.00	101,822.50 f	
		Adjusted Cost Basis		101,684.86 f d	1,684.86-
		Current Year Amortized Premium		79.13 j	
FEDERAL HOME LOAN BANKS 5.87500% /3133XRHA4					
07/25/08	07/09/09	200,000.000	200,000.00	200,108.75 f	
		Adjusted Cost Basis		200,100.89 f d	100.89-
		Current Year Amortized Premium		4.39 j	
FEDERAL NATL MTG ASSN FANNIE 6.50000% /3135A0WK1					
09/12/08	04/27/09	50,000.000	50,000.00	49,968.75 f	
		Adjusted Cost Basis		49,968.75 f d	31.25
ROHM & HAAS CO CASH MERGER AT $78.00 PER/775371107					
12/15/08	03/09/09	800.000	53,793.73	54,238.96 f	445.23-
				Short-Term Realized Gain	31.25
				Short-Term Realized Loss	2,591.38-
				Short-Term Realized Disallowed Loss	0.00
				Total Short-Term Realized Gain/Loss	**2,560.13-**

f - FIFO (First-in, First-out)

d - Adjusted cost basis reflects any cumulative original issue discount, premium, or acquisition premium (including any year-to-date amount). It assumes such amounts were amortized or accrued for tax purposes from the acquisition date through the disposition date. Premium amortization was calculated using the yield-to-maturity method. Acquisition premium was calculated using the ratable accrual method. Any market discount accretion for this position was calculated using the straight-line method and, if applicable, recognized upon disposition. Gain/loss displayed for this transaction is calculated using the cost basis adjustments, as described above. The adjusted cost basis used here may not reflect all adjustments necessary for tax reporting purposes (such as wash sale adjustments) and may not apply if you are using an alternative amortization calculation Refer to IRS Publication 550, *Investment Income and Expenses*.for additional information.

j - Current year amortized premium was calculated using the yield-to-maturity amortization method. Cumulative premium amortization from acquisition date through disposition date is reflected in the adjusted cost basis. For tax-exempt securities, amortization of premium is required and is not deductible from taxable income. For taxable bonds, a tax election may be required to amortize premium, and the current year's amortized premium may be deductible from taxable income. Our adjusted cost basis calculation may not reflect all adjustments necessary for tax reporting purposes. It may not be applicable if you have not made a particular tax election or if you are using an alternative amortization calculation method. Review prior adjustments that you have made, and consult your tax advisor and IRS Publication 550, *Investment Income and Expenses*. for additional information.

Realized Gain/Loss

ADVISORS

As of Date: 2/05/10

Account Number: 7535-7178
SECCHIA FAMILY FOUNDATION HP11
MICHIGAN NON-PROFIT CORP
PETER F SECCHIA PRESIDENT

Long Term

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	DATE ACQUIRED	CLOSE DATE	PROCEEDS	ADJ COST/ ORIG COST	GAIN/LOSS
GOLDMAN SACHS TR FINL SQUARE MMKT FD CL I	1,313.1900	1.0000	02/27/07	01/09/09	1,313.19	1,313.19	0.00
	3.7100	1.0000	03/01/07	01/09/09	3.71	3.71	0.00
	114.5000	1.0000	04/04/07	01/09/09	114.50	114.50	0.00
	108.3100	1.0000	05/01/07	01/09/09	108.31	108.31	0.00
	104.6300	1.0000	06/01/07	01/09/09	104.63	104.63	0.00
	101.9200	1.0000	07/02/07	01/09/09	101.92	101.92	0.00
	100.1000	1.0000	08/01/07	01/09/09	100.10	100.10	0.00
	95.7200	1.0000	09/04/07	01/09/09	95.72	95.72	0.00
	93.6300	1.0000	10/01/07	01/09/09	93.63	93.63	0.00
	79.5100	1.0000	11/01/07	01/09/09	79.51	79.51	0.00
	66.2000	1.0000	12/03/07	01/09/09	66.20	66.20	0.00
	67.9200	1.0000	01/02/08	01/09/09	67.92	67.92	0.00
Total - Long Term					$2,249.34	$2,249.34	$0.00

Realized Gain/Loss

As of Date: 2/05/10

ADVISORS

Account Number: 7535-7131
SECCHIA FAMILY FOUNDATION HP11
MICHIGAN NON-PROFIT CORP
PETER F SECCHIA PRESIDENT

Long Term

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	DATE ACQUIRED	CLOSE DATE	PROCEEDS	ADJ COST/ ORIG COST	GAIN/LOSS
AFLAC INC	676.0000	52.7900	07/24/07	01/27/09	14,580.69	35,686.04	-21,105.35
	203.0000	56.4455	09/26/07	01/27/09	4,378.53	11,458.44	-7,079.91
Total - Long Term					$18,959.22	$47,144.48	-$28,185.26

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Account No.	Taxpayer ID.	Page
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Fidelity Investments

Customer Service: 616-459-3421

THE SECCHIA FAMILY FOUNDATION
396SF
220 LYON ST NW STE 510
GRAND RAPIDS MI 49503-2210

Detail Information — Long-Term Realized Gain/Loss

Cost basis, realized gain and loss, and holding period information reported may not reflect all adjustments necessary for tax reporting purposes. This information is not reported to the IRS. It may assist you in tax return preparation.

Description / CUSIP Date Acquired	Date Sold	Quantity	Proceeds	Cost Basis		Gain/Loss (-)
AMERICAN EXPRESS CO /025816109						
07/26/07	04/24/09	1,500.000	38,038.07	89,758.00	f	51,719.93-
CATERPILLAR INC /149123101						
05/31/07	10/14/09	2,000.000	108,095.82	156,444.80	f	48,348.98-
CHASE MANHATTAN CORP NEW 7.12500% /16161ABQ0						
04/01/08	06/15/09	125,000.000	125,000.00	129,511.89	f	
		Adjusted Cost Basis		125,000.00	f d	0.00
	Current Year Amortized Premium			1,738.93	j	
CHESAPEAKE ENERGY CORPORATION OKLAHOMA /165167107						
10/06/05	02/09/09	1,300.000	24,702.39	42,999.00	f	18,296.61-
FEDL HOME LN MTG CRP MED TERM NOTES /3128X2K79						
03/16/04	04/22/09	150,000.000	150,000.00	149,879.38	f	
		Adjusted Cost Basis		149,879.38	f d	120.62
FEDERAL HOME LN MTG CORP 6.00000% /3128X6QZ2						
11/07/07	02/23/09	75,000.000	75,000.00	75,011.25	f	
		Adjusted Cost Basis		75,010.64	f d	10.64-
	Current Year Amortized Premium			0.07	j	
FEDERAL HOME LN MTG CORP 5.81500% /3128X7A07						
04/18/08	06/17/09	250,000.000	250,000.00	251,840.00	f	
		Adjusted Cost Basis		251,746.30	f d	1,746.30-
	Current Year Amortized Premium			38.21	j	
FEDERAL HOME LN BKS CONS BD 6.05000% /3133XLWN9						
01/08/08	08/14/09	100,000.000	100,000.00	102,687.50	f	
		Adjusted Cost Basis		102,335.02	f d	2,335.02-
	Current Year Amortized Premium			140.55	j	
GENERAL ELEC CAP (CONSENT) FR 08.12500% /369CON9N4						
unknown	04/13/09	100,000.000	1,000.00	unknown		unknown

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Fidelity Investments

2009 Supplemental Information		
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579-404640	38-2841093	9 of 10

THE SECCHIA FAMILY FOUNDATION
396SF
220 LYON ST NW STE 510
GRAND RAPIDS MI 49503-2210

Customer Service: 616-459-3421

Detail Information — Long-Term Realized Gain/Loss

Description / CUSIP Date Acquired	Date Sold	Quantity	Proceeds	Cost Basis	Gain/Loss (-)
Cost basis, realized gain and loss, and holding period information reported may not reflect all adjustments necessary for tax reporting purposes. This information is not reported to the IRS. It may assist you in tax return preparation.					
GENERAL ELECTRIC CO /369604103					
04/29/03	07/16/09	1,400.000	17,346.60	40,941.95 f	23,595.35-

Long-Term Realized Gain	120.62
Long-Term Realized Loss	146,052.83-
Long-Term Realized Disallowed Loss	0.00
Total Long-Term Realized Gain/Loss	**145,932.21-††**

f - FIFO (First-in, First-out)

d - Adjusted cost basis reflects any cumulative original issue discount, premium, or acquisition premium (including any year-to-date amount). It assumes such amounts were amortized or accrued for tax purposes from the acquisition date through the disposition date. Premium amortization was calculated using the yield-to-maturity method. Acquisition premium was calculated using the ratable accrual method. Any market discount accretion for this position was calculated using the straight-line method and, if applicable, recognized upon disposition. Gain/loss displayed for this transaction is calculated using the cost basis adjustments, as described above. The adjusted cost basis used here may not reflect all adjustments necessary for tax reporting purposes (such as wash sale adjustments) and may not apply if you are using an alternative amortization calculation Refer to IRS Publication 550, *Investment Income and Expenses*, for additional information.

j - Current year amortized premium was calculated using the yield-to-maturity amortization method. Cumulative premium amortization from acquisition date through disposition date is reflected in the adjusted cost basis. For tax-exempt securities, amortization of premium is required and is not deductible from taxable income. For taxable bonds, a tax election may be required to amortize premium, and the current year's amortized premium may be deductible from taxable income. Our adjusted cost basis calculation may not reflect all adjustments necessary for tax reporting purposes. It may not be applicable if you have not made a particular tax election or if you are using an alternative amortization calculation method. Review prior adjustments that you have made, and consult your tax advisor and IRS Publication 550, *Investment Income and Expenses*, for additional information.

†† - All gain/loss information may not be reflected due to incomplete cost basis information.

Amortization, accretion, and similar adjustments to cost basis are not provided for short-term instruments, unit investment trusts, or securities of foreign issuers.

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To see the interactive *Helpful Hints for Completing Form 1040, Schedule D*, visit Fidelity.com/ScheduleD.

Important Tax Return Document Enclosed

2009 Tax Information Statement

Account Number: 14014700
Recipient's Tax ID number: 38-2641093
Payer's Federal ID number: 90-0138321
Questions? (616)454-2852

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
SECCHIA FAMILY FOUNDATION
220 LYON NW, SUITE 510
GRAND RAPIDS , MI 49503

Payer's Name and Address
LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

2009 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS are Gross Proceeds less commissions and option premiums.

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
Short Term Sales Reported on 1099-B								
869.0000	G1150G111	ACCENTURE LTD-CL A	12/09/2008	01/30/2009	27,554.82	25,303.11	2,251.71	0.00
920.0000	H0023R105	ACE LIMITED	VARIOUS	01/30/2009	40,624.12	52,559.89	-11,935.77	0.00
353.0000	037411105	APACHE CORP	12/10/2008	01/30/2009	26,735.36	25,880.80	854.56	0.00
629.0000	00206R102	AT & T INC	09/09/2008	01/30/2009	15,644.02	20,542.76	-4,898.74	0.00
3373.5060	131582207	CALVERT INCOME FUND-A #908	VARIOUS	02/12/2009	46,284.50	50,790.52	-4,506.02	0.00
1200.0000	13321L108	CAMECO CORP	02/10/2009	10/16/2009	35,331.09	20,468.40	14,862.69	0.00
300.0000	149123101	CATERPILLAR INC DEL	02/10/2009	10/16/2009	16,296.03	9,482.97	6,813.06	0.00
400.0000	16941M109	CHINA MOBILE LIMITED SPONS ADR	02/10/2009	03/26/2009	18,084.89	19,260.88	-1,175.99	0.00
117.0000	12572Q105	CME GROUP INC.	VARIOUS	10/16/2009	37,096.23	33,433.68	3,662.55	0.00
120.8910	19765J830	COLUMBIA MID CAP VALUE FD-Z	03/26/2008	02/02/2009	927.24	1,839.98	-912.74	0.00
100.0000	20441W203	COMPANHIA DE BEBIDAS-PR ADR	02/10/2009	08/18/2009	6,542.58	4,376.65	2,165.93	0.00
100.0000	20441W203	COMPANHIA DE BEBIDAS-PR ADR	02/10/2009	10/16/2009	9,405.00	4,376.65	5,028.35	0.00
406.0000	235851102	DANAHER CORP	08/01/2008	01/30/2009	22,938.87	32,714.10	-9,775.23	0.00
376.0000	244199105	DEERE & CO.	03/06/2008	02/10/2009	14,569.91	33,367.10	-18,797.19	0.00
899.4390	256206103	DODGE & COX INTL STOCK FUND	VARIOUS	02/03/2009	17,494.09	18,852.23	-1,358.14	0.00
750.0000	292659109	ENERGY CONVERSION DEVICES INC	02/10/2009	10/16/2009	8,941.48	21,289.55	-12,348.07	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

2009 Tax Information Statement

Account Number: 14014700
Recipient's Tax ID number: 38-2641093
Payer's Federal ID number: 90-0138321
Questions? (616)454-2852

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
SECCHIA FAMILY FOUNDATION
220 LYON NW, SUITE 510
GRAND RAPIDS, MI 49503

Payer's Name and Address
LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
700.0000	30161N101	EXELON CORP	02/10/2009	10/16/2009	35,063.49	39,510.80	-4,447.31	0.00
539.0000	302130109	EXPEDITORS INTL WASH INC	VARIOUS	01/30/2009	15,103.03	19,425.90	-4,322.87	0.00
715.0000	302182100	EXPRESS SCRIPTS A	VARIOUS	01/30/2009	38,776.23	44,046.23	-5,270.00	0.00
1905.0000	81369Y605	FINANCIAL SELECT SECTOR SPDR	12/17/2008	01/30/2009	17,776.60	24,443.25	-6,666.65	0.00
2496.0000	81369Y605	FINANCIAL SELECT SECTOR SPDR	01/27/2009	02/20/2009	17,599.70	22,613.51	-5,013.81	0.00
200.0000	375558103	GILEAD SCIENCES INC	02/10/2009	05/29/2009	8,347.11	10,026.00	-1,678.89	0.00
75.0000	38141G104	GOLDMAN SACHS GROUP INC	02/10/2009	06/18/2009	10,741.65	6,915.00	3,826.65	0.00
75.0000	38141G104	GOLDMAN SACHS GROUP INC	02/10/2009	10/16/2009	13,850.64	6,915.00	6,935.64	0.00
200.0000	38141G104	GOLDMAN SACHS GROUP INC	02/10/2009	12/09/2009	32,539.16	18,440.00	14,099.16	0.00
950.0000	411310105	HANSEN NATURAL CORP	VARIOUS	08/07/2009	34,065.26	33,500.03	565.23	0.00
956.0000	423074103	HEINZ H J CO COM	VARIOUS	01/30/2009	35,065.88	45,281.69	-10,215.81	0.00
24318.1420	47103A823	JANUS RSK MG GRWTH I	VARIOUS	07/09/2009	213,999.65	195,000.00	18,999.65	0.00
350.0000	46625H100	JP MORGAN CHASE & CO	02/10/2009	10/16/2009	16,219.39	8,959.48	7,259.91	0.00
3757.7120	4812A2389	JP MORGAN US L/C CORE PLUS-S	08/04/2009	10/15/2009	67,000.00	60,912.51	6,087.49	0.00
350.0000	502424104	L-3 COM HLDGS INC	02/10/2009	10/16/2009	26,741.81	27,153.50	-411.69	0.00
390.0000	50540R409	LABORATORY CORP AMER HLDGS	11/12/2008	01/30/2009	23,108.37	24,514.93	-1,406.56	0.00
350.0000	539830109	LOCKHEED MARTIN CORP	02/10/2009	10/16/2009	26,375.85	27,726.72	-1,350.87	0.00
1000.0000	617446448	MORGAN STANLEY	02/10/2009	07/27/2009	28,031.26	21,885.95	6,145.31	0.00
882.0000	78464A102	MORGAN STANLEY TECHNOLOGY ETF	VARIOUS	01/30/2009	29,589.64	35,674.47	-6,084.83	0.00

This is important tax information and is being furnished to the Internal Revenue Service. If you are required to file a return, a negligence penalty or other sanction may be imposed on you if this income is taxable and the IRS determines that it has not been reported.

A4B-B1 /

2009 Tax Information Statement

Account Number: 14014700
Recipient's Tax ID number: 38-2641093
Payer's Federal ID number: 90-0138321
Questions? (616)454-2852

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
SECCHIA FAMILY FOUNDATION
220 LYON NW, SUITE 510
GRAND RAPIDS, MI 49503

Payer's Name and Address
LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
22006.9480	680020347	OLD MUTUAL ANALY US LO/SH-Z	VARIOUS	08/04/2009	216,328.30	191,616.90	24,711.40	0.00
10638.1830	680020347	OLD MUTUAL ANALY US LO/SH-Z	VARIOUS	09/28/2009	107,000.00	88,746.15	18,253.85	0.00
1455.7090	683974109	OPPENHEIMER DEVELOPING MKTS	VARIOUS	02/03/2009	21,573.61	21,864.75	-291.14	0.00
700.0000	704549104	PEABODY ENERGY CORP	02/10/2009	10/16/2009	29,275.52	20,058.85	9,216.67	0.00
2775.0000	73935X336	POWERSHARES DYN BANKING	09/18/2008	02/05/2009	34,384.30	57,545.72	-23,161.42	0.00
1511.0000	73935X336	POWERSHARES DYN BANKING	01/27/2008	02/20/2009	16,320.39	19,216.75	-2,896.36	0.00
585.0000	747525103	QUALCOMM INC COM	08/01/2008	01/30/2009	20,382.33	32,128.84	-11,746.51	0.00
738.8250	750869703	RAINIER L/C CORE EQUITY FUND-INST	02/11/2008	02/11/2009	12,574.80	20,000.00	-7,425.20	0.00
1220.0000	78462F103	SPDR S&P 500 ETF TRUST	VARIOUS	01/30/2009	101,613.23	142,397.52	-40,784.29	0.00
1867.0860	784924870	SSGA INTL STOCK SELECTION FD	07/09/2009	10/15/2009	18,820.23	14,712.64	4,107.59	0.00
1574.0000	855030102	STAPLES INC COM	VARIOUS	01/30/2009	25,404.21	38,778.91	-13,374.70	0.00
24.8120	77954Q106	T ROWE PRICE BLUE CHIP GROWTH FUND	12/16/2008	02/03/2009	563.73	550.82	12.91	0.00
809.0000	87612E106	TARGET CORP	VARIOUS	01/30/2009	25,717.96	43,307.88	-17,589.92	0.00
224.2190	87234N385	TCW DIVERSIFED VALUE FUND	12/23/2008	02/11/2009	1,867.74	1,984.16	-98.42	0.00
1177.6220	885215566	THORNBURG INTL VALUE FD I	07/09/2009	10/15/2009	30,017.60	24,247.24	5,770.36	0.00
231.0000	H8817H100	TRANSOCEAN LTD	07/31/2008	04/01/2009	13,735.18	31,614.68	-17,879.50	0.00
1137.0000	917047102	URBAN OUTFITTERS INC	VARIOUS	01/30/2009	17,956.93	40,315.16	-22,358.23	0.00
187.0000	91913Y100	VALERO ENERGY CORPORATION	02/10/2009	10/16/2009	3,296.81	3,990.85	-694.04	0.00

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2009 Tax Information Statement

Account Number: 14014700
Recipient's Tax ID number: 38-2641093
Payer's Federal ID number: 90-0138321
Questions? (616)454-2852

☐ Corrected ☐ 2nd TIN notice

Recipient's Name and Address
SECCHIA FAMILY FOUNDATION
220 LYON NW, SUITE 510
GRAND RAPIDS, MI 49503

Payer's Name and Address
LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
4725.8980	922031794	VANGUARD GNMA FUND ADMIRAL CL #536	02/12/2009	09/28/2009	50,850.66	50,000.00	850.66	0.00
375.0000	922908736	VANGUARD GROWTH ETF	11/05/2008	01/30/2009	14,153.40	15,922.50	-1,769.10	0.00
72.8870	922018205	VANGUARD WINDSOR II #73	VARIOUS	02/20/2009	1,168.38	1,573.51	-405.13	0.00
400.0000	H27013103	WEATHERFORD INTNTL LTD	02/10/2009	08/18/2009	8,152.55	4,607.68	3,544.87	0.00
250.0000	H27013103	WEATHERFORD INTNTL LTD	02/10/2009	10/16/2009	5,172.84	2,879.80	2,293.04	0.00
6160.5710	957663305	WESTERN ASSET CORE BD PORT-I	VARIOUS	09/08/2009	62,776.22	55,361.66	7,414.56	0.00
3914.8020	0075W0734	WHG LARGE CAP VALUE FUND-INST	VARIOUS	02/11/2009	29,126.13	38,000.00	-8,873.87	0.00
Total Short Term Sales Reported on 1099-B					**1,902,697.98**	**2,008,887.21**	**-106,189.23**	**0.00**
Long Term 15% Sales Reported on 1099-B								
421.0000	88579Y101	3M CO	07/24/2007	01/30/2009	22,774.92	38,041.56	-15,266.64	0.00
175.0000	037833100	APPLE INC	VARIOUS	10/16/2009	33,064.44	22,354.72	10,709.72	0.00
100.0000	037833100	APPLE INC	VARIOUS	12/07/2009	19,051.76	10,525.82	8,525.94	0.00
1600.0000	00206R102	AT & T INC	09/09/2008	10/16/2009	41,087.10	52,255.04	-11,167.94	0.00
536.0000	086516101	BEST BUY COMPANY INC	VARIOUS	06/18/2009	18,459.63	26,807.12	-8,347.49	0.00
63086.2470	131582207	CALVERT INCOME FUND-A #908	VARIOUS	02/12/2009	865,543.31	1,046,095.15	-180,551.84	0.00
202.0000	166764100	CHEVRON CORPORATION	07/24/2007	01/30/2009	14,340.87	18,529.03	-4,188.16	0.00
600.0000	17275R102	CISCO SYSTEMS INC	12/13/2007	10/16/2009	14,359.28	17,596.14	-3,236.86	0.00
14626.7110	19765J103	COLUMBIA MARSICO 21ST CENT-A	VARIOUS	02/03/2009	116,428.62	218,429.90	-102,001.28	0.00

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Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
24057.3120	19765J830	COLUMBIA MID CAP VALUE FD-Z	09/25/2007	02/02/2009	184,519.58	358,752.11	-174,232.53	0.00
1052.0000	126650100	CVS CAREMARK CORP	07/24/2007	08/18/2009	32,804.21	38,029.69	-5,225.48	0.00
7475.1090	256206103	DODGE & COX INTL STOCK FUND	VARIOUS	02/03/2009	145,390.87	261,609.42	-116,218.55	0.00
918.0000	25746U109	DOMINION RESOURCES INC VA	07/24/2007	01/30/2009	32,359.33	39,795.30	-7,435.97	0.00
635.0000	302130109	EXPEDITORS INTL WASH INC	07/24/2007	01/30/2009	14,990.94	25,068.34	-10,077.40	0.00
202.0000	30231G102	EXXONMOBIL CORP	10/16/2007	01/30/2009	15,751.87	19,166.24	-3,414.37	0.00
400.0000	437076102	HOME DEPOT INC COM	01/29/2008	10/16/2009	10,872.04	11,727.52	-855.48	0.00
620.0000	452308109	ILLINOIS TOOL WORKS	VARIOUS	01/30/2009	20,455.86	34,653.68	-14,197.82	0.00
4558.6930	47103A823	JANUS RSK MG GRWTH I	04/24/2006	07/09/2009	40,098.90	61,469.79	-21,370.89	0.00
26009.8670	56062X690	MAINSTAY MID CAP GROWTH-I	08/01/2007	02/02/2009	189,091.73	368,770.75	-179,679.02	0.00
1020.0000	594918104	MICROSOFT CORP	01/03/2008	01/30/2009	17,533.70	36,034.36	-18,500.66	0.00
407.0000	78464A102	MORGAN STANLEY TECHNOLOGY ETF	11/28/2007	01/30/2009	13,654.17	25,131.84	-11,477.67	0.00
3425.4020	680020347	OLD MUTUAL ANALY US LO/SH-Z	VARIOUS	08/04/2009	33,671.70	49,000.00	-15,328.30	0.00
2462.2830	683974109	OPPENHEIMER DEVELOPING MKTS	VARIOUS	02/03/2009	36,491.03	98,444.89	-61,953.86	0.00
376.0000	713448108	PEPSICO INC COM	VARIOUS	01/30/2009	18,973.06	25,911.53	-6,938.47	0.00
3173.0000	73935X351	POWERSHARES DYN HEALTHCARE	VARIOUS	02/10/2009	62,013.72	92,768.94	-30,755.22	0.00
237.0000	74005P104	PRAXAIR INC	07/24/2007	01/30/2009	14,692.18	18,350.91	-3,658.73	0.00
453.0000	742718109	PROCTER & GAMBLE CO	07/24/2007	01/30/2009	24,961.29	28,946.70	-3,985.41	0.00
640.0000	806857108	SCHLUMBERGER LTD	07/24/2007	04/01/2009	25,997.53	61,001.84	-35,004.31	0.00

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048.017

2009 Tax Information Statement

Account Number: 14014700
Recipient's Tax ID number: 38-2641093
Payer's Federal ID number: 90-0138321
Questions? (616)454-2852

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GRAND RAPIDS , MI 49503

Payer's Name and Address
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300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

Number of shares (Box 5)	CUSIP (Box 1b)	Description (Box 7)	Date Acquired	Date of Sale (Box 1a)	Stocks Bonds, etc. (Box 2)	Cost or other Basis	Net Gain or Loss	Federal Income Tax Withheld (Box 4)
1605.1360	784924870	SSGA INTL STOCK SELECTION FD	07/25/2008	10/15/2009	16,179.77	20,000.00	-3,820.23	0.00
7868.9120	77954Q108	T ROWE PRICE BLUE CHIP GROWTH FUND	VARIOUS	02/03/2009	178,781.68	301,175.86	-122,394.18	0.00
10124.5500	87234N385	TCW DIVERSIFED VALUE FUND	VARIOUS	02/11/2009	84,337.51	159,102.60	-74,765.09	0.00
195.4650	885215566	THORNBURG INTL VALUE FD I	09/10/2008	10/15/2009	4,982.40	5,000.00	-17.60	0.00
1084.0000	913017109	UNITED TECHNOLOGIES CORP	VARIOUS	01/30/2009	51,999.19	79,949.78	-27,950.59	0.00
933.0000	91913Y100	VALERO ENERGY CORPORATION	07/31/2008	10/16/2009	18,418.72	31,466.36	-13,047.64	0.00
2055.6680	922018205	VANGUARD WINDSOR II #73	VARIOUS	02/20/2009	32,952.36	66,255.02	-33,302.66	0.00
1036.0000	92343V104	VERIZON COMMUNICATIONS	07/24/2007	01/30/2009	30,945.14	44,423.96	-13,478.82	0.00
3652.9720	957663305	WESTERN ASSET CORE BD PORT-I	VARIOUS	09/08/2009	37,223.78	40,000.00	-2,776.22	0.00
378.0000	983024100	WYETH	07/24/2007	01/30/2009	16,291.70	19,621.98	-3,330.28	0.00
1000.0000	983024100	WYETH	07/24/2007	07/27/2009	47,280.78	51,910.00	-4,629.22	0.00
Total Long Term 15% Sales Reported on 1099-B					2,598,826.69	3,924,173.89	-1,325,347.20	0.00

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048.01 /

As of Date: 2/05/10

Account Number: 7535-7131
SECCHIA FAMILY FOUNDATION HP11
MICHIGAN NON-PROFIT CORP
PETER F SECCHIA PRESIDENT

Important Realized Gain/Loss Information

This information is provided for courtesy purposes only. Each individual taxpayer should consult with a tax advisor as to any additional reporting requirements or adjustments. NO COST BASIS OR REALIZED GAIN/LOSS INFORMATION IS PROVIDED TO THE IRS, NOR IS THIS INFORMATION VERIFIED OR GUARANTEED BY FIRST CLEARING, LLC TO BE ACCURATE FOR EACH TAXPAYER'S UNIQUE REPORTING REQUIREMENTS. THEREFORE, YOU SHOULD NEVER ASSUME THIS STATEMENT IS ACCURATE IN LIEU OF COMPLETING SCHEDULE D OF YOUR TAX RETURN AND CONSULTING WITH YOUR TAX ADVISOR.

Federal tax reporting requirements will create differences between the information presented here and what appears on your Form 1099-B, including but not limited to the following situations:

- Cost basis for many fixed income tax lots has been amortized (for securities purchased at a premium) or accreted (for securities purchased at a discount), when possible, for applicable securities. For securities that were purchased at an Original Issue Discount (OID), only those positions whose cost basis has been adjusted will reflect the impacts of the OID accruals on the original cost basis. The original issue discount amount reported on your Form 1099-OID is not adjusted for market discount, acquisition premium or bond premium. Therefore, the amortization and accretion adjustments used on this statement may not be consistent with the Form 1099-OID amount because the reporting requirements on the Form 1099-OID are different.
- The Original Price represents the unadjusted price of the security. The Original Price can be used to calculate the original unadjusted cost of the security.
- Short sales are reportable on Form 1099-B before the position is closed.
- Implicit redemptions by the issuer of a structured product are reportable on Form 1099-B, but will not appear on the Realized Gain/Loss Statement if that implicit redemption did not result in a closed tax lot at that time.
- Securities subject to marked to market reporting requirements for those investors are not included here nor is that information available on our systems.
- Long-term capital gains reported by a RIC or REIT appear on Form 1099-DIV only, as noted in the instructions for that form.
- Lots closed due to transfers or journals will not be reflected in the Realized Gain/Loss Statement, or on the Form 1099-B.

Realized Gain/Loss Summary	THIS YEAR GAIN	THIS YEAR LOSS	THIS YEAR NET
Short term	0.00	-24,434.05	-24,434.05
Long term	0.00	-28,185.26	-28,185.26
Total - Realized Gain/Loss	$0.00	-$52,619.31	-$52,619.31

Realized Gain/Loss Detail for Year

Short Term

DESCRIPTION	QUANTITY	ADJ PRICE/ ORIG PRICE	DATE ACQUIRED	CLOSE DATE	PROCEEDS	ADJ COST/ ORIG COST	GAIN/LOSS
US BANCORP NEW	281.0000	32.3428	02/08/08	01/27/09	3,762.96	9,088.32	-5,325.36
	979.0000	32.9099	03/12/08	01/27/09	13,110.10	32,218.79	-19,108.69
Total - Short Term					$16,873.06	$41,307.11	-$24,434.05

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