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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

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

OMB No 1545-0052
2009

For calendar year 2009, or tax year beginning 01-01-2009 , and ending 12-31-2009

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 IACocca Family Foundation		A Employer identification number 38-6071154	
	Number and street (or P O box number if mail is not delivered to street address) Room/suite 867 BOYLSTON STREET 6TH FLOOR		B Telephone number (see page 10 of the instructions) (617) 267-7747	
	City or town, state, and ZIP code BOSTON, MA 02116		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 38,309,256		J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> 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)	436,723			
	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.	856,869	856,637		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-313,109			
	b Gross sales price for all assets on line 6a _____ 3,009,676				
	7 Capital gain net income (from Part IV , line 2)		0		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	980,483	856,637		
	13 Compensation of officers, directors, trustees, etc	208,333	104,166		104,167
	14 Other employee salaries and wages	167,461	25,119		142,342
	15 Pension plans, employee benefits	101,640	15,246		86,394
	16a Legal fees (attach schedule).	254	38		216
	b Accounting fees (attach schedule).	7,100	1,065		6,035
	c Other professional fees (attach schedule)	121,361	98,488		22,873
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	24,035	3,553		20,482
	19 Depreciation (attach schedule) and depletion	10,665	0		
	20 Occupancy	125,956	18,893		107,063
	21 Travel, conferences, and meetings	13,244	6,622		6,622
	22 Printing and publications				
	23 Other expenses (attach schedule)	85,982	12,898		73,084
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	866,031	286,088		569,278
	25 Contributions, gifts, grants paid	1,054,700			2,528,967
	26 Total expenses and disbursements. Add lines 24 and 25	1,920,731	286,088		3,098,245
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-940,248			
	b Net investment income (if negative, enter -0-)		570,549		
	c Adjusted net income (if negative, enter -0-)				

Part II


Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1Cash—non-interest-bearing	36,994	90,234	90,234
	2Savings and temporary cash investments			
	3Accounts receivable ▶ <u>1,733,573</u>			
	Less allowance for doubtful accounts ▶ _____	165,868	1,733,573	1,733,573
	4Pledges receivable ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	5Grants receivable			
	6Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7Other notes and loans receivable (attach schedule) ▶ _____			
	Less allowance for doubtful accounts ▶ _____			
	8Inventories for sale or use			
	9Prepaid expenses and deferred charges			
	10aInvestments—U S and state government obligations (attach schedule)			
	bInvestments—corporate stock (attach schedule)	3,000,000 	3,702,315	3,702,315
	cInvestments—corporate bonds (attach schedule).			
	11Investments—land, buildings, and equipment basis ▶ _____			
Liabilities	Less accumulated depreciation (attach schedule) ▶ _____			
	12Investments—mortgage loans			
	13Investments—other (attach schedule)	28,272,150 	30,978,555	30,978,555
	14Land, buildings, and equipment basis ▶ <u>62,996</u>			
	Less accumulated depreciation (attach schedule) ▶ <u>18,065</u>	51,003 	44,931	44,931
	15Other assets (describe ▶ _____)	 1,692,888 	1,759,648 	1,759,648 
	16Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	33,218,903	38,309,256	38,309,256
	17Accounts payable and accrued expenses	5,935	2,394	
	18Grants payable	2,029,267	555,000	
	19Deferred revenue			
	20Loans from officers, directors, trustees, and other disqualified persons			
	21Mortgages and other notes payable (attach schedule)			
	22Other liabilities (describe ▶ _____)			
	23Total liabilities (add lines 17 through 22)	2,035,202	557,394	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.			
	24Unrestricted	31,183,701	37,751,862	
	25Temporarily restricted			
	26Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.			
	27Capital stock, trust principal, or current funds			
	28Paid-in or capital surplus, or land, bldg , and equipment fund			
	29Retained earnings, accumulated income, endowment, or other funds			
	30Total net assets or fund balances (see page 17 of the instructions)	31,183,701	37,751,862	
	31Total liabilities and net assets/fund balances (see page 17 of the instructions)	33,218,903	38,309,256	

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	31,183,701
2	Enter amount from Part I, line 27a	2	-940,248
3	Other increases not included in line 2 (itemize) ▶ 	3	7,508,409
4	Add lines 1, 2, and 3	4	37,751,862
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	37,751,862

Part IV

Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	Securities and mutual funds		2009-01-01	2009-12-31
b	HALL CAPITAL		2007-12-31	2009-12-31
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 1,276,103		1,422,785	-146,682
b 1,733,573		1,900,000	-166,427
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			-146,682
b			-166,427
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	-313,109
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	3,947,861	41,882,815	0 094260
2007	2,864,325	50,829,200	0 056352
2006	2,254,367	48,076,542	0 046891
2005	2,386,322	40,909,466	0 058332
2004	2,583,763	39,402,007	0 065574

2 Total of line 1, column (d).	2	0 321409
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 064282
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5.	4	33,983,247
5 Multiply line 4 by line 3.	5	2,184,511
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	5,705
7 Add lines 5 and 6.	7	2,190,216
8 Enter qualifying distributions from Part XII, line 4.	8	3,098,245

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 VIExcise 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 ☒ and enter 1% of Part I, line 27b

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-)

3

Add lines 1 and 2.

4

Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)

5

Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-

6

Credits/Payments

a

2009 estimated tax payments and 2008 overpayment credited to 2009

6a

58,537

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.

8

Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached.

9

Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed

10

Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.

11

Enter the amount of line 10 to be Credited to 2010 estimated tax ☒ 52,832 Refunded ☒

1

5,705

2

0

3

5,705

4

0

5

5,705

7

58,537

8

9

10

52,832

11

0

Part VII-AStatements Regarding Activities

1a

During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?

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)?

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?

d

Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year:
(1) On the foundation ☒ \$ 0 (2) On foundation managers ☒ \$ 0

e

Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☒ \$ 0

2

Has the foundation engaged in any activities that have not previously been reported to the IRS?
If "Yes," attach a detailed description of the activities

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

4a

Did the foundation have unrelated business gross income of \$1,000 or more during the year?

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

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?

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

8a

Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) ☒ 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 .

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

10

Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

Yes

No

1a

No

1b

No

1c

No

2

No

3

No

4a

No

4b

5

No

6

Yes

7

Yes

8b

Yes

9

No

10

No

Part VII-A

Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ▶ IACoccaFoundation.org	13	Yes	
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 ▶ <input type="checkbox"/> 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? <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. ▶ <input type="checkbox"/>	1b		No
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?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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).	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?. <input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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).	3b		No
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2009?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a

During the year did the foundation pay or incur any amount to

(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

5b

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)? Organizations relying on a current notice regarding disaster assistance check here.

c

If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

Yes

No

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

6a

Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes

No

b

Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

Yes

No

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?

7b

No

Part VIII

Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors

1

List all officers, directors, trustees, foundation managers and their compensation (see 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
See Additional Data Table				

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
Jennifer L Phillips	operations manager	78,333	30,791	0
867 boylston street boston,MA 02116	40 00			
Norma Saken	executive assistant	60,177	15,283	0
867 boylston street boston,MA 02116	40 00			

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

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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
ASPIRIANT	INVESTMENT MANAGEMENT	81,250
101 SECOND STREET		
SAN FRANCISCO,CA 94105		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1	
2	
3	
4	

Part IX-B

Summary of Program-Related Investments (see page 23 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	
2	
All other program-related investments See page 24 of the instructions	
3	
Total. Add lines 1 through 3.	0

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	29,104,674
b	Average of monthly cash balances.	1b	136,999
c	Fair market value of all other assets (see page 24 of the instructions).	1c	5,259,085
d	Total (add lines 1a, b, and c).	1d	34,500,758
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	34,500,758
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	517,511
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	33,983,247
6	Minimum investment return. Enter 5% of line 5.	6	1,699,162

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	1,699,162
2a	Tax on investment income for 2009 from Part VI, line 5.	2a	5,705
b	Income tax for 2009 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	5,705
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,693,457
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,693,457
6	Deduction from distributable amount (see page 25 of the instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,693,457

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	3,098,245
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	3,098,245
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	5,705
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	3,092,540
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 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			
2		Undistributed income, if any, as of the end of 2008			
a		Enter amount for 2008 only. 0			
b		Total for prior years 20____, 20____, 20____ 0			
3		Excess distributions carryover, if any, to 2009			
a		From 2004. 663,593			
b		From 2005. 417,289			
c		From 2006.			
d		From 2007. 407,925			
e		From 2008. 1,883,210			
f		Total of lines 3a through e. 3,372,017			
4		Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ 3,098,245			
a		Applied to 2008, but not more than line 2a 0			
b		Applied to undistributed income of prior years (Election required—see page 26 of the instructions) 0			
c		Treated as distributions out of corpus (Election required—see page 26 of the instructions). . . . 0			
d		Applied to 2009 distributable amount. 1,693,457			
e		Remaining amount distributed out of corpus 1,404,788			
5		Excess distributions carryover applied to 2009 0 0			
		(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 4,776,805			
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 page 27 of the instructions 0			
e		Undistributed income for 2008 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions 0			
f		Undistributed income for 2009 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2010 0			
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) 0			
8		Excess distributions carryover from 2004 not applied on line 5 or line 7 (see page 27 of the instructions) 663,593			
9		Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a 4,113,212			
10		Analysis of line 9			
a		Excess from 2005. 417,289			
b		Excess from 2006.			
c		Excess from 2007. 407,925			
d		Excess from 2008. 1,883,210			
e		Excess from 2009. 1,404,788			

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 organization is a private operating foundation described in section 4942(j)(3) or 4942(j)(5)

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2009	(b) 2008	(c) 2007	(d) 2006	
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 organization had \$5,000 or more in assets at any time during the year—see page 27 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))

Lido A Iacocca

b

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

2

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

Check here ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (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

KATHRYN IACOCCA HENTZ
867 boylston street 6th floor
boston,MA 02116
(617) 267-7747

b

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

GRANT APPLICATION AT WWW.IACOCCAFUNDATION.ORG

c

Any submission deadlines

there are no submission deadlines

d

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

PRIMARILY CONCERNED WITH DIABETES RESEARCH - RELATED ACTIVITIES

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 Additional Data Table				
Total			3a	2,528,967
b Approved for future payment Marian High School 7225 Lahser Road Bloomfield Hills, MI 48301		public Charity	unrestricted	30,000
The Ronald Reagan Presidential Foundation 40 Presidential Drive Suite 200 Simi Valley, CA 93065		public Charity	unrestricted	25,000
St Margaret Episcopal School 31641 LaNovia San Juan Capistrano, CA 92675		public Charity	unrestricted	500,000
Total			3b	555,000

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2009)

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?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.	1a(1)		No
(2) Other assets.	1a(2)		No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.	1b(1)		No
(2) Purchases of assets from a noncharitable exempt organization.	1b(2)		No
(3) Rental of facilities, equipment, or other assets.	1b(3)		No
(4) Reimbursement arrangements.	1b(4)		No
(5) Loans or loan guarantees.	1b(5)		No
(6) Performance of services or membership or fundraising solicitations.	1b(6)		No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.	1c		No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received			

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) 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

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					
*****			2010-09-13	*****	
Signature of officer or trustee			Date	Title	
Paid Preparer's Use Only	Preparer's Signature	THOMAS WASHBURN CPA	Date 2010-09-13	Check if self-employed <input checked="" type="checkbox"/>	Preparer's identifying number (see Signature on page 30 of the instructions)
	Firm's name (or yours if self-employed), address, and ZIP code	ALEXANDER ARONSON FINNING & CO PC 21 EAST MAIN STREET WESTBORO, MA 01581		EIN	Phone no (508) 366-9100

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 organization IACocca Family Foundation	Employer identification number 38-6071154
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Organization type (check one)

Filers of:	Section:
Form 990 or 990-EZ	<input type="checkbox"/> 501(c)() (enter number) organization
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation
	<input type="checkbox"/> 527 political organization
Form 990-PF	<input checked="" type="checkbox"/> 501(c)(3) exempt private foundation
	<input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation
	<input type="checkbox"/> 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 33¹/₃% 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 IACocca Family Foundation	Employer identification number 38-6071154
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Part I **Contributors** (see Instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
<u>1</u>	<u>IACOCCA CLUT FBO ARIANNA ASSAD</u> <u>C/O COMERICA</u> <u>DETROIT, MI 48226</u> 	\$ <u>80,970</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>2</u>	<u>IACOCCA CLUT FBO PARKER LEE HENTZ</u> <u>C/O COMERICA BANK</u> <u>DETROIT, MI 48226</u> 	\$ <u>104,417</u>	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>3</u>	<u>LEE IACCOCA</u> <u>867 BOYLSTON STREET</u> <u>BOSTON, MA 02116</u> 	\$ <u>251,335</u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input checked="" type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u> </u>	 	\$ <u> </u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u> </u>	 	\$ <u> </u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u> </u>	 	\$ <u> </u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization IACOCCA FAMILY FOUNDATION	Employer identification number 38-6071154
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Part II Noncash Property (see Instructions)			
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
3	Apple Stock	\$ 251,335	2009-12-31
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Name of organization IACocca Family Foundation	Employer identification number 38-6071154
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Part III

Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. (Complete columns (a) through (e) and the following line entry)
For organizations completing Part III, enter the total of *exclusively* religious, charitable, etc , contributions of **\$1,000 or less** for the year (Enter this information once See instructions) ▶ \$

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	<div>Transferee's name, address, and ZIP 4</div> <div>Relationship of transferor to transferee</div> <div></div> <div></div> <div></div>		
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	<div>Transferee's name, address, and ZIP 4</div> <div>Relationship of transferor to transferee</div> <div></div> <div></div> <div></div>		
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	<div>Transferee's name, address, and ZIP 4</div> <div>Relationship of transferor to transferee</div> <div></div> <div></div> <div></div>		
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	<div>Transferee's name, address, and ZIP 4</div> <div>Relationship of transferor to transferee</div> <div></div> <div></div> <div></div>		
—	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>	<div></div> <div></div> <div></div>
	(e) Transfer of gift		
	<div>Transferee's name, address, and ZIP 4</div> <div>Relationship of transferor to transferee</div> <div></div> <div></div> <div></div>		

Additional Data

Software ID: 09000028

Software Version: 2009.04020

EIN: 38-6071154

Name: IACOCCA FAMILY FOUNDATION


Form 990PF Part VIII Line 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
Lido A Iacocca	Chairman 3 00	0	0	0
867 Boylston Street 6th Floor Boston, MA 02116				
Kathryn Iacocca Hentz	President 40 00	208,333	31,152	0
867 Boylston Street 6th Floor Boston, MA 02116				
JOHN GERACE	Trustee 2 00	0	0	0
867 Boylston Street 6th Floor Boston, MA 02116				
edward bousa	Trustee 1 00	0	0	0
867 Boylston Street 6th Floor Boston, MA 02116				
Louis E Lataif	secretary 1 00	0	0	0
867 Boylston Street 6th Floor Boston, MA 02116				
Lia Iacocca-Assad	Trustee 1 00	0	0	0
867 Boylston Street 6th Floor Boston, MA 02116				
Desmond Heathwood	Trustee 1 00	0	0	0
867 Boylston Street 6th Floor Boston, MA 02116				
ken anderson	trustee 1 00	0	0	0
867 Boylston Street 6th Floor boston, MA 02116				
ginny king	trustee 1 00	0	0	0
867 Boylston Street 6th Floor boston, MA 02116				

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Baylor College of MedicineOne Baylor Place Houston, TX 77090		public Charity	unrestricted	300,000
The University of Vermont208 South Park Drive Colchester, VT 05446		public Charity	unrestricted	99,999
University of California San Francisco 513 Parnassus Avenue San Francisco, CA 94143		public Charity	unrestricted	100,000
Medical College of Wisconsin8701 Watertown Plank Road Milwaukee, WI 53226		public Charity	unrestricted	78,190
Dana-Farber Cancer Institute44 Binney Street Boston, MA 02115		public Charity	unrestricted	169,950
Los Angeles Children's Hospital4650 Sunset Blvd MS 35 Los Angeles, CA 90027		public Charity	unrestricted	125,000
Mt Sinai School of MedicineOne Gustave L Levy Place New York, NY 10029		public Charity	unrestricted	125,000
University of Pennsylvania415 Curie Blvd Philadelphia, PA 19105		public Charity	unrestricted	137,500
Mayo Clinic Rochester200 First Street SW Rochester, MN 55905		public Charity	unrestricted	252,628
University of Minnesota Medical SchoolMMC 280 420 Delaware Street SE Minneapolis, MN 55455		public Charity	unrestricted	50,000
St John's High School378 Main Street Shrewsbury, MA 01545		public Charity	unrestricted	5,000
Lehigh University111 Research Drive Bethlehem, PA 18015		public Charity	Restricted for global village	19,500
St Sebastian's School1191 Greendale Avenue Needham, MA 02492		public Charity	Unrestricted	250,000
St Joseph Parish1382 Highland Avenue Needham, MA 02492		public Charity	unrestricted	25,000
Dana Hall School45 Dana Road PO Box 9010 Wellesley, MA 024829010		public Charity	unrestricted	25,000
Total ▶ 3a				2,528,967

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Dover and sherborn Education Fund PO Box 421 Dover, MA 02030		public Charity	unrestricted	5,000
Nantucket Boys and Girls ClubPO Box 269 Nantucket, MA 02554		public Charity	unrestricted	500
The Nantucket School of Design and the ArtsBox 1848 Nantucket Island, MA 02554		public Charity	unrestricted	500
Saint Francis Chapel800 Boylston Street Suite 1001 Boston, MA 02199		public Charity	unrestricted	500
Saint Sebastian's School1191 Greendale Avenue Needham, MA 02492		public Charity	unrestricted	25,000
Boston POPS on Nantucket57 Prospect Street Nantucket Island, MA 02554		public Charity	unrestricted	15,000
AIGA 164 Fifth Avenue New York, NY 10010		public Charity	unrestricted	1,200
Cranbrook Schools520 Lone Pine Road PO Box 801 Bloomfield Hills, MI 483030801		public Charity	Unrestricted	10,000
ALS- The Pinstripes FundPO Box 32861 Charlotte, NC 28232		public Charity	unrestricted	2,500
Care for Vrindavan135 Hathaway Rd Schuylerville, NY 12871		public Charity	unrestricted	5,000
Children First4350 Von Karman Fourth Floor Newport Beach, CA 92660		public Charity	unrestricted	2,500
Desert Cancer Foundation45480 Portola Avenue Palm desert, CA 92260		public Charity	unrestricted	1,000
Hoag Hospital FoundationPO Box 6100 Newport Beach, CA 92658		public Charity	unrestricted	7,500
Human OptionsPO Box 53745 Irvine, CA 92619		public Charity	unrestricted	5,000
Levantine Cultural Center5998 W Pico Blvd Los Angeles, CA 90035		public Charity	unrestricted	1,000
Total  3a				2,528,967

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Orange County Museum of Art850 san Clemente Drive Newport Beach,CA 92660		public Charity	unrestricted	10,000
The Painted Turtle1300 4th Street Suite 300 Santa Monica,CA 90401		public Charity	unrestricted	1,000
Planet Hope4335 Van Nuys Blvd 4335 Sherman Oaks,CA 91403		public Charity	unrestricted	25,000
Promises foundation11340 West Olympic Blvd Suite 242 Los Angeles,CA 90064		public Charity	unrestricted	20,000
PS I Love You Foundation1408 Goodman Avenue Redondo Beach,CA 90278		public Charity	unrestricted	5,000
The REACH Foundation3101 Villa Way Newport Beach,CA 92663		public Charity	unrestricted	25,000
St George's Episcopal Church23802 Avenida de la Carlota Laguna Hills,CA 92653		public Charity	unrestricted	5,000
St Jude Children's Research Hospital 12365 Lewis Street Suite 101 Garden Grove,CA 92840		public Charity	unrestricted	5,000
Sweet Relief4952 Warner Avenue Suite 100 Huntington Beach,CA 92649		public Charity	unrestricted	2,500
The REACH Foundation3101 Villa Way Newport Beach,CA 92663		public Charity	unrestricted	7,500
The WORLD Research Foundation41 Bell Rock Plaza Sedona,AZ 86351		public Charity	unrestricted	1,000
Seeds Arts and Education758 Manzanita Drive Laguna Beach,CA 92651		public Charity	unrestricted	500
Catholic Big Brothers and Sisters 1530 James M Wood Blvd Los Angeles,CA 90026		public Charity	unrestricted	4,000
Yellowstone Womens First Step House Inc154 East Bay Street Costa Mesa,CA 92627		public Charity	unrestricted	2,500
Canyon Club Inc20456 Laguna Canyon Road Laguna Beach,CA 92651		public Charity	unrestricted	2,500
Total 3a				2,528,967

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Make it Right Foundation1055 St Charles Ave Suite 500 New Orleans, LA 70158		public Charity	unrestricted	7,500
Los Angeles Regional Food Bank1734 E 41st Street Los Angeles, CA 90058		public Charity	unrestricted	2,500
Planet Hope4335 Van Nuys Blvd 4335 Sherman Oaks, CA 91403		public Charity	unrestricted	14,500
Canyon Club Inc20456 Laguna Canyon Road Laguna Beach, CA 92651		public Charity	unrestricted	2,500
Promises Foundation11340 West Olympic Blvd Suite 242 Los Angeles, CA 90064		public Charity	unrestricted	1,500
Sweet Relief4952 Warner Avenue Suite 100 Huntington Beach, CA 92649		public Charity	unrestricted	2,500
Believe in Sobriety30025 Alicia Parkway 195 Laguna Niguel, CA 93677		public Charity	unrestricted	3,000
Marian High School7225 Lahser Road Bloomfield Hills, MI 48301		public Charity	unrestricted	10,000
Yellowstone Womens First Step House Inc154 East Bay Street Costa Mesa, CA 92627		public Charity	unrestricted	6,000
Betty Ford Center39000 Bob Hope Drive Rancho Mirage, CA 92270		public Charity	unrestricted	10,000
Candlelighter Childhood Cancer Family Alliance8323 Southwest Freeway Suite 435 Houston, TX 77074		public Charity	unrestricted	5,000
Concern Foundation8383 Wilshire Blvd Suite 337 Beverly Hills, CA 90211		public Charity	unrestricted	6,000
Forgotten Harvest21800 Greenfield Road Oak Park, MI 48237		public Charity	unrestricted	1,000
Hospice of Palm Beach County5300 E Avenue West Palm Beach, FL 33407		public Charity	unrestricted	10,000
Humane Society of Pagosa Springs 269 Pagosa St PO Box 2330 Pagosa Springs, CO 81147		public Charity	unrestricted	5,000
Total 3a				2,528,967

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
The Jewish Federation6505 Wilshire Blvd Suite 1050 Los Angeles, CA 90048		public Charity	unrestricted	10,000
UCLA Jules Stein Eye Institute400 Stein Plaza UCLA box 957000 Los Angeles, CA 90095		public Charity	unrestricted	10,000
UCLA Jules Stein Eye Institute100 Stein Plaza Los Angeles, CA 900957000		public Charity	unrestricted	10,000
National Italian American Foundation1860 19th St NW Washington, DC 20009		public Charity	unrestricted	1,000
New York-Presbyterian525 East 68th Street Box 123 New York, NY 10065		public Charity	unrestricted	10,000
Oral Roberts Whole Person Endowed Scholarship Fund1005 Granville Dr Newport Beach, RI 92660		public Charity	unrestricted	10,000
St Hugo of the Hills22515 Opdyke Road Bloomfeild Hills, MI 48304		public Charity	unrestricted	1,000
Starkey Hearing Foundation6700 Washington Avenue South Eden Prairie, MN 55344		public Charity	unrestricted	10,000
Sinai Medical Center8700 Beverly Blvd Suite 2416 Los Angeles, CA 90048		public Charity	unrestricted	5,000
The Brent Shapiro Foundation10250 Constellation Blvd 18th FL Los Angeles, CA 90067		public Charity	unrestricted	5,000
Promises Foundation11340 w Olympic Blvd 242 Los Angeles, CA 90064		public Charity	unrestricted	10,000
National MS Society2440 SSepulueda Blvd115 Los Angeles, CA 90064		public Charity	unrestricted	1,000
Small Army for a Cure20 Newbury Street 4th Floor Boston, MA 02116		public Charity	unrestricted	1,000
St George Catholic Church4980 Heege Rd St Louis, MO 63123		public Charity	unrestricted	500
National Charity LeaguePO Box 8423 Calabasas, CA 91372		public Charity	unrestricted	500
Total ▶ 3a				2,528,967

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
Planet Hope8205 Santa Monica Boulevard Los Angeles, CA 90046		public Charity	Restricted for Camp Hope	7,500
UCLA Jules Stein Eye Institute100 Stein Plaza Los Angeles, CA 90095		public Charity	unrestricted	10,000
The Ronald Reagan Presidential Foundation40 Presidential Drive Suite 200 Simi Valley, CA 93065		public Charity	unrestricted	25,000
Dana Hall School45 Dana Road Wellesley, MA 02482		public Charity	Unrestricted	250,000
Joslin Diabetes CenterOne Joslin Place Boston, MA 02116		public Charity	unrestricted	50,000
Joslin Diabetes CenterOne Joslin Place Boston, MA 02116		public Charity	unrestricted	50,000
Children's Hospital BostonPO Box 414413 Boston, MA 02241		public Charity	unrestricted	3,000
Total				2,528,967

TY 2009 Accounting Fees Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
aACCOUNTING	7,100	1,065		6,035

TY 2009 Investments Corporate Stock Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Name of Stock	End of Year Book Value	End of Year Fair Market Value
Publicly Traded Securities	252,878	252,878
Privately held - Bayhill	3,449,437	3,449,437

TY 2009 Investments - Other Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
Mutual Funds	FMV	30,460,734	30,460,734
Cash held for investments	FMV	517,821	517,821

TY 2009 Land, Etc. Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
Equipment	62,996	18,065	44,931	44,931

TY 2009 Legal Fees Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	254	38		216

TY 2009 Other Assets Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
csv life insurance policy	1,692,888	1,759,648	1,759,648

TY 2009 Other Expenses Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SUPPLIES	6,936	1,040		5,896
TELEPHONE	8,017	1,203		6,814
POSTAGE, SHIPPING & DELIVERY	3,635	545		3,090
INSURANCE	33,815	5,072		28,743
OUTSIDE COMPUTER SERVICES	8,398	1,260		7,138
PAYROLL PROCESSING FEES	2,385	358		2,027
STORAGE	5,435	815		4,620
MEALS	6,562	984		5,578
REPAIRS	190	29		161
MISCELLANEOUS	358	54		304
Bank service charges	313	47		266
Membership dues	9,938	1,491		8,447

TY 2009 Other Increases Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Description	Amount
uNREALIZED GAIN	7,508,409

TY 2009 Other Professional Fees Schedule**Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
oTHER	24,310	3,647		20,663
Investment	94,451	94,451		0
bookkeeping	2,600	390		2,210

TY 2009 Taxes Schedule**Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
payroll taxes	23,685	3,553		20,132
Real estate taxes	350	0		350