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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

**2010**

For calendar year 2010, or tax year beginning 01-01-2010 , and ending 12-31-2010

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Name of foundation  
IACOCCA FAMILY FOUNDATION

Number and street (or P O box number if mail is not delivered to street address)  
867 BOYLSTON STREET 6TH FLOOR

City or town, state, and ZIP code  
BOSTON, MA 02116

**A Employer identification number**  
38-6071154

**B Telephone number** (see page 10 of the instructions)  
(617) 267-7747

**C** If exemption application is pending, check here ☐

**D 1.** Foreign organizations, check here ☐

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







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

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

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

**I** Fair market value of all assets at end of year (from Part II, col. (c), line 16)  
\$ 42,397,811

**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	<b>1</b> Contributions, gifts, grants, etc , received (attach schedule)	1,408,053			
	<b>2</b> Check <input type="checkbox"/> if the foundation is <b>not</b> required to attach Sch B				
	<b>3</b> Interest on savings and temporary cash investments				
	<b>4</b> Dividends and interest from securities. . . . .	1,117,124	1,117,124		
	<b>5a</b> Gross rents . . . . .				
	<b>b</b> Net rental income or (loss) _____				
	<b>6a</b> Net gain or (loss) from sale of assets not on line 10	-1,990,873			
	<b>b</b> Gross sales price for all assets on line 6a <u>10,342,976</u>				
	<b>7</b> Capital gain net income (from Part IV , line 2) . . . .		0		
	<b>8</b> Net short-term capital gain . . . . .				
	<b>9</b> Income modifications . . . . .				
	<b>10a</b> Gross sales less returns and allowances				
	<b>b</b> Less Cost of goods sold . . . . .				
Operating and Administrative Expenses	<b>c</b> Gross profit or (loss) (attach schedule) . . . . .				
	<b>11</b> Other income (attach schedule) . . . . .	 8,132	8,132		
	<b>12 Total.</b> Add lines 1 through 11 . . . . .	542,436	1,125,256		
	<b>13</b> Compensation of officers, directors, trustees, etc	287,208	28,720		258,488
	<b>14</b> Other employee salaries and wages . . . . .	149,448	14,945		134,503
	<b>15</b> Pension plans, employee benefits . . . . .	94,255	9,425		84,830
	<b>16a</b> Legal fees (attach schedule). . . . .	 36,211	3,621		32,590
	<b>b</b> Accounting fees (attach schedule). . . . .	 8,375	837		7,538
	<b>c</b> Other professional fees (attach schedule) . . . . .	 38,440	29,440		9,000
	<b>17</b> Interest . . . . .				
	<b>18</b> Taxes (attach schedule) (see page 14 of the instructions)	 28,796	2,851		25,945
	<b>19</b> Depreciation (attach schedule) and depletion . . . .	11,560	0		
	<b>20</b> Occupancy . . . . .	111,752	11,175		100,577
	<b>21</b> Travel, conferences, and meetings . . . . .	25,109	12,555		12,554
	<b>22</b> Printing and publications . . . . .				
	<b>23</b> Other expenses (attach schedule). . . . .	 110,217	11,022		99,195
	<b>24 Total operating and administrative expenses.</b> Add lines 13 through 23 . . . . .	901,371	124,591		765,220
	<b>25</b> Contributions, gifts, grants paid . . . . .	2,320,024			1,541,074
	<b>26 Total expenses and disbursements.</b> Add lines 24 and 25	3,221,395	124,591		2,306,294
	<b>27</b> Subtract line 26 from line 12				
	<b>a Excess of revenue over expenses and disbursements</b>	-2,678,959			
	<b>b Net investment income</b> (if negative, enter -0-)		1,000,665		
	<b>c Adjusted net income</b> (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 . . . . .	90,234	237,990	237,990
	2Savings and temporary cash investments . . . . .			
	3Accounts receivable ▶ 554,304			
	Less allowance for doubtful accounts ▶	1,733,573	554,304	554,304
	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) . . . . .	3,702,315	4,457,107	4,457,107
	cInvestments—corporate bonds (attach schedule). . . . .			
	11Investments—land, buildings, and equipment basis ▶			
Liabilities	Less accumulated depreciation (attach schedule) ▶			
	12Investments—mortgage loans . . . . .			
	13Investments—other (attach schedule) . . . . .	30,978,555	35,207,734	35,207,734
	14Land, buildings, and equipment basis ▶ 64,613			
	Less accumulated depreciation (attach schedule) ▶ 29,625	44,931	34,988	34,988
	15Other assets (describe ▶)	1,759,648	1,905,688	1,905,688
	16Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	38,309,256	42,397,811	42,397,811
	17Accounts payable and accrued expenses . . . . .	2,394		
	18Grants payable . . . . .	555,000	1,333,950	
	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) . . . . .	557,394	1,333,950	
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 . . . . .	37,751,862	41,063,861	
	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) . . . . .	37,751,862	41,063,861	
	31Total liabilities and net assets/fund balances (see page 17 of the instructions) . . . . .	38,309,256	42,397,811	

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	37,751,862
2	Enter amount from Part I, line 27a . . . . .	2	-2,678,959
3	Other increases not included in line 2 (itemize) ▶	3	5,990,958
4	Add lines 1, 2, and 3 . . . . .	4	41,063,861
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	41,063,861

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	VARIOUS	P	2010-01-01	2010-12-31
b	VARIOUS	D	2009-12-29	2010-01-07
c	VARIOUS	P	2009-01-01	2010-12-31
d	VARIOUS	P	2009-01-01	2010-12-31
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 1,638,818		1,563,747	75,071
b 251,574		38,808	212,766
c 8,352,584		10,623,351	-2,270,767
d 100,000		107,943	-7,943
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			75,071
b			212,766
c			-2,270,767
d			-7,943
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	-1,990,873
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))
2009	3,092,540	33,983,247	0 091002
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

2 Total of line 1, column (d). . . . .	2	0 346837
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 069367
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5. . . . .	4	38,020,563
5 Multiply line 4 by line 3. . . . .	5	2,637,372
6 Enter 1% of net investment income (1% of Part I, line 27b). . . . .	6	10,007
7 Add lines 5 and 6. . . . .	7	2,647,379
8 Enter qualifying distributions from Part XII, line 4. . . . .	8	2,307,911

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)

1aExempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)				
bDomestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b . . . . .			1	20,013
cAll other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)				
2Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			2	0
3Add lines 1 and 2. . . . .			3	20,013
4Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)			4	0
5Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0- . . . . .			5	20,013
6Credits/Payments				
a	2010 estimated tax payments and 2009 overpayment credited to 2010	6a	52,832	
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		
7Total credits and payments Add lines 6a through 6d. . . . .			7	52,832
8Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached			8	
9Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . . . .			9	
10Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid. . . . .			10	32,819
11Enter the amount of line 10 to be Credited to 2011 estimated tax <input type="checkbox"/> 32,819 Refunded <input type="checkbox"/>			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? . . . . .		Yes	No
		1a		No
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.	1b		No
c	Did the foundation file Form 1120-POL for this year?. . . . .	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0 (2) On foundation managers <input type="checkbox"/> \$ 0			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . . . If "Yes," attach a detailed description of the activities.	2		No
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes . . . . .	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?. . . . .	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?. . . . .	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . If "Yes," attach the statement required by General Instruction T.	5		No
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . . . .	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) <input type="checkbox"/> MA, MI			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV . . . . .	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	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 <b>Form 1041</b> —Check here . . . . . ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . ▶	15		
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? . . . . .	16		No
See page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person? <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? ( <b>Exception.</b> 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 <b>any</b> 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 2010? . . . . .	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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? . . . . . <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 <b>not</b> 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 <b>all</b> 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 2010 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? ( <i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2010.</i> ). . . . .	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 2010?	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

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)?

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?

5b

6b

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	87,500	35,260	0
867 BOYLSTON STREET	MANAGER			
BOSTON,MA 02116	40 00			
NORMA SAKEN	EXECUTIVE	61,500	17,500	0
867 BOYLSTON STREET	ASSISTANT			
BOSTON,MA 02116	40 00			
Total number of other employees paid over \$50,000.				0

Part VIII

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

3 Five highest-paid independent contractors for professional services (see 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. . . . .		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 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	
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	32,428,300
b	Average of monthly cash balances. . . . .	1b	261,828
c	Fair market value of all other assets (see page 24 of the instructions). . . . .	1c	5,909,428
d	Total (add lines 1a, b, and c). . . . .	1d	38,599,556
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	38,599,556
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions). . . . .	4	578,993
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	38,020,563
6	Minimum investment return. Enter 5% of line 5. . . . .	6	1,901,028

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	1,901,028
2a	Tax on investment income for 2010 from Part VI, line 5. . . . .	2a	20,013
b	Income tax for 2010 (This does not include the tax from Part VI ). . . . .	2b	
c	Add lines 2a and 2b. . . . .	2c	20,013
3	Distributable amount before adjustments Subtract line 2c from line 1. . . . .	3	1,881,015
4	Recoveries of amounts treated as qualifying distributions. . . . .	4	0
5	Add lines 3 and 4. . . . .	5	1,881,015
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	1,881,015

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	2,306,294
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	1,617
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	2,307,911
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4. . . . .	6	2,307,911
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 2009	(c) 2009	(d) 2010
1		Distributable amount for 2010 from Part XI, line 7			
2		Undistributed income, if any, as of the end of 2010			
a		Enter amount for 2009 only. . . . . 0			
b		Total for prior years 20____, 20____, 20____ 0			
3		Excess distributions carryover, if any, to 2010			
a		From 2005. . . . . 417,289			
b		From 2006. . . . .			
c		From 2007. . . . . 407,925			
d		From 2008. . . . . 1,883,210			
e		From 2009. . . . . 1,404,788			
f		Total of lines 3a through e. . . . . 4,113,212			
4		Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 2,307,911			
a		Applied to 2009, 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 2010 distributable amount. . . . . 1,881,015			
e		Remaining amount distributed out of corpus 426,896			
5		Excess distributions carryover applied to 2010 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 4,540,108			
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 2009 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions . . . . . 0			
f		Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011. . . . . 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 2005 not applied on line 5 or line 7 (see page 27 of the instructions). . . . . 417,289			
9		Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a . . . . . 4,122,819			
10		Analysis of line 9			
a		Excess from 2006. . . . .			
b		Excess from 2007. . . . . 407,925			
c		Excess from 2008. . . . . 1,883,210			
d		Excess from 2009. . . . . 1,404,788			
e		Excess from 2010. . . . . 426,896			

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 2010, 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) 2010	(b) 2009	(c) 2008	(d) 2007	
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)				
<div>a Paid during the year</div> See Additional Data Table				
<div>Total . . . . .</div>			<div>3a</div>	1,541,074
<div>b Approved for future payment</div> See Additional Data Table				
<div>Total . . . . .</div>			<div>3b</div>	1,333,950

## Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2010)

Part XVII

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

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) 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)

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.

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

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.

\*\*\*\*\*

Signature of officer or trustee

2011-06-29

Date

\*\*\*\*\*

Title

Paid Preparer's Use Only

Preparer's Signature

THOMAS WASHBURN CPA

Date

2011-06-29

Check if self-employed ☐

PTIN

Firm's name

ALEXANDER ARONSON FINNING & CO PC

Firm's EIN

Firm's address

21 EAST MAIN STREET

WESTBORO, MA 01581

Phone no.

(508) 366-9100

Form 990-PF (2010)

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

2010

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

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 <b>not</b> 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 33<sup>1</sup>/<sub>3</sub>% 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 on line H 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).

<b>Name of organization</b> IACocca Family Foundation	<b>Employer identification number</b> 38-6071154
--	---

**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>181,347</u>	<b>Person</b> <input checked="" type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
<u>2</u>	<u>IACOCCA CLUT FBO PARKER LEE HENTZ</u> <u>201 WASHINGTON STREET</u>  <u>BOSTON, MA 02108</u>  	\$ <u>218,164</u>	<b>Person</b> <input checked="" type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
<u>3</u>	<u>LIDO A IACOCCA</u> <u>867 BOYLSTON STREET</u>  <u>BOSTON, MA 02116</u>  	\$ <u>1,007,670</u>	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input checked="" type="checkbox"/>  (Complete Part II if there is a noncash contribution )
<u>    </u>	    	\$ <u>                    </u>	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
<u>    </u>	    	\$ <u>                    </u>	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <input type="checkbox"/>  (Complete Part II if there is a noncash contribution )
<u>    </u>	    	\$ <u>                    </u>	<b>Person</b> <input type="checkbox"/> <b>Payroll</b> <input type="checkbox"/> <b>Noncash</b> <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	PUBLICLY TRADED SECURITIES	\$ 1,007,670	2010-12-31
(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
		\$	
(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		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	
(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		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	
(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		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	
(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		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
<div></div> <div></div>		<div></div> <div></div> <div></div>	

Additional Data

Software ID:

Software Version:


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	34,000	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
JOHN D 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				
MARGARET LAURENCE	EXECUTIVE DIRECTOR 40 00	78,875	7,500	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)				
<b>a</b> Paid during the year				
JOHNS HOPKINS UNIVERSITY 3400 N CHARLES STREET 221 MARYLAND HALL BALTIMORE, MD 21218		PUBLIC CHARITY	UNRESTRICTED	147,840
EASTERN VIRGINA MEDICAL SCHOOL 721 FAIRFAX AVENUE SUITE 132 NORFOLK, VA 23507		PUBLIC CHARITY	UNRESTRICTED	125,000
UNIVERSITY OF VERMONT 85 S PROSPECT STREET BURLINGTON, VT 05405		PUBLIC CHARITY	UNRESTRICTED	106,073
ST MARGARET'S EPISCOPAL SCHOOL 31641 LANOVIA AVENUE SAN JUAN CAPISTRANO, CA 92675		PUBLIC CHARITY	UNRESTRICTED	105,500
UNIVERSITY OF SOUTHERN CA HERITAGE HALL 203A LOS ANGELES, CA 90089		PUBLIC CHARITY	UNRESTRICTED	101,000
BECKMAN RESEARCH INSTITUTE CITY OF HOPE 1500 EAST DUARTE ROAD DUARTE, CA 91010		PUBLIC CHARITY	UNRESTRICTED	99,000
JOSLIN DIABETES CENTER ONE JOSLIN PLACE BOSTON, MA 02215		PUBLIC CHARITY	UNRESTRICTED	94,100
ROSALIND FRANKLIN UNIVERSITY 3333 GREEN BAY ROAD N CHICAGO, IL 60064		PUBLIC CHARITY	UNRESTRICTED	90,631
RUSH UNIVERSITY MEDICAL CENTER 1700 W VAN BUREN SUITE 250 CHICAGO, IL 60612		PUBLIC CHARITY	UNRESTRICTED	82,610
UNIVERSITY OF CA REGENTS REED NEUROLOGICAL RESEARCH CENTER 710 WESTWOOD PLAZA LOS ANGELES, CA 90095		PUBLIC CHARITY	UNRESTRICTED	75,000
CARDIOVASCULAR RESEARCH FOUNDATION 414 NORTH CAMDEN DRIVE SUITE 1100 BEVERLY HILLS, CA 90210		PUBLIC CHARITY	UNRESTRICTED	50,000
ST JOSEPH'S PARISH 1382 HIGHLAND AVENUE NEEDHAM, MA 02492		PUBLIC CHARITY	UNRESTRICTED	25,680
DANA HALL SCHOOL 45 DANA ROAD WELLESLEY, MA 02482		PUBLIC CHARITY	UNRESTRICTED	25,000
FREEDOM BEYOND ADDICTION 1126 ROSE AVENUE VENICE, CA 90291		PUBLIC CHARITY	UNRESTRICTED	25,000
RONALD REAGAN PRESIDENTIAL LIBRARY FUND 40 PRESIDENTIAL DRIVE SUITE 200 SIMI VALLEY, CA 93065		PUBLIC CHARITY	UNRESTRICTED	25,000
<b>Total . . . . .</b>  <b>3a</b>				1,541,074


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)				
<b>a</b> Paid during the year				
SACRED HEART CATHOLIC CHURCH 43775 DEEP CANYON ROAD PALM DESERT, CA 92260		PUBLIC CHARITY	UNRESTRICTED	25,000
ST SEBASTAIN'S SCHOOL 1191 GREENDALE AVENUE NEEDHAM, MA 02492		PUBLIC CHARITY	UNRESTRICTED	25,000
THE CAMPAIGN FOR CATHOLIC SCHOOLS 143 NEWBURY STREET BOSTON, MA 02116		PUBLIC CHARITY	UNRESTRICTED	25,000
REACH FOUNDATION 500 OLD NEWPORT BLVD SUITE 204 NEWPORT BEACH, CA 92663		PUBLIC CHARITY	UNRESTRICTED	20,000
UCLA JULES STEIN EYE INSTITUTE 10920 WILSHIRE BLVD SUITE 1400 LOS ANGELES, CA 90024		PUBLIC CHARITY	UNRESTRICTED	20,000
LEHIGH UNIVERSITY 111 RESEARCH DRIVE BETHLEHAM, PA 18015		PUBLIC CHARITY	UNRESTRICTED	19,500
KEEP MEMORY ALIVE 888 W BONNEVILLE AVENUE LOS VEGAS, NV 89106		PUBLIC CHARITY	UNRESTRICTED	15,000
PROMISES FOUNDATION PO BOX 662087 LOS ANGELES, CA 90066		PUBLIC CHARITY	UNRESTRICTED	15,000
THE CATHOLIC CENTER BOSTON UNIVERSITY 211 BAY STATE ROAD BOSTON, MA 02215		PUBLIC CHARITY	UNRESTRICTED	15,000
NANTUCKET COTTAGE HOSPITAL 57 PROSPECT STREET NANTUCKET, MA 02554		PUBLIC CHARITY	UNRESTRICTED	13,250
BETTY FORD CENTER FOUNDATION 41990 COOK STREET SUITE C-301 PALM DESERT, CA 92211		PUBLIC CHARITY	UNRESTRICTED	10,000
CROHN'S & COLITIS FOUNDATION 386 PARK AVENUE FLOOR 17 NEW YORK, NY 10016		PUBLIC CHARITY	UNRESTRICTED	10,000
MARIAN HIGH SCHOOL 7225 LAHSER ROAD BLOOMFIELD HILLS, MI 48301		PUBLIC CHARITY	UNRESTRICTED	10,000
USS MIDWAY 910 N HARBOR DRIVE SAN DIEGO, CA 92101		PUBLIC CHARITY	UNRESTRICTED	10,000
ST MONICA CATHOLIC HIGH SCHOOL 1030 LINCOLN BLVD SANTA MONICA, CA 90403		PUBLIC CHARITY	UNRESTRICTED	7,750
<b>Total . . . . .</b>  <b>3a</b>				1,541,074


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)				
<b>a</b> Paid during the year				
AMERICAN CANCER SOCIETY 73161 FRED WARING DRIVE SUITE 100 PALM DESERT,CA 92260		PUBLIC CHARITY	UNRESTRICTED	10,000
BRENT SHAPIRO FOUNDATION 10250 CONSTELLATION BLVD18TH FLOOR LOS ANGELES,CA 90067		PUBLIC CHARITY	UNRESTRICTED	5,000
CRANBROOK SCHOOL 380 LONE PINE ROAD BLOOMFIELD HILLS,MI 48303		PUBLIC CHARITY	UNRESTRICTED	5,000
EAGLE & BADGE FOUNDATION 5903 NOBLE AVENUE VAN NUYS,CA 91411		PUBLIC CHARITY	UNRESTRICTED	5,000
EAST TENNESSEE STATE UNIVERSITY PO BOX 70734 JOHNSON CITY,TN 37614		PUBLIC CHARITY	UNRESTRICTED	5,000
FERNDALE METHODIST CHURCH 1950 WOODWARD HEIGHTS FERNDALE,MI 48220		PUBLIC CHARITY	UNRESTRICTED	5,000
HARVARD SCHOOL OF PUBLIC HEALTH 677 HUNTINGTON AVENUE BOSTON,MA 02115		PUBLIC CHARITY	UNRESTRICTED	5,000
JENN'S HOUSE 3250 SOUTH CEDAR CREST BLVD EMMAUS,PA 18049		PUBLIC CHARITY	UNRESTRICTED	5,000
LAKE ARROWHEAD REPERTORY THEATRE COMPANY PO BOX 1626 BLUE JAY,CA 92317		PUBLIC CHARITY	UNRESTRICTED	5,000
NATIONAL MUSEUM OF INDUSTRIAL HISTORY 530 E THIRD STREET BETHLEHAM,PA 18015		PUBLIC CHARITY	UNRESTRICTED	5,000
NATIONAL STUTTERING ASSOCIATION 119 W 40TH STREET 14TH FLOOR NEW YORK,NY 10018		PUBLIC CHARITY	UNRESTRICTED	5,000
PLANET HOPE 4335 VAN NUYS BLVD 413 SHERMAN OAKS,CA 91403		PUBLIC CHARITY	UNRESTRICTED	5,000
RANCHO BERNARDO COMMUNITY FOUNDATION 16870 WEST BERNARDO DRIVE SUITE 458 SAN DIEGO,CA 92127		PUBLIC CHARITY	UNRESTRICTED	5,000
ST HUGO OF THE HILLS 2215 OPDYKE ROAD BLOOMFIELD HILLS,MI 48304		PUBLIC CHARITY	UNRESTRICTED	5,000
ST JOHN'S HIGH SCHOOL 378 MAIN STREET SHREWSBURY,MA 01545		PUBLIC CHARITY	UNRESTRICTED	5,000
<b>Total . . . . .</b>  <b>3a</b>				1,541,074

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)				
<b>a</b> Paid during the year				
ST JUDE'S CHILDREN RESEARCH 12365 LEWIS STREET SUITE 101 GARDEN GROVE, CA 92840		PUBLIC CHARITY	UNRESTRICTED	5,000
UC IRVINE DIABETES CENTER 100 THEORY 250 IRVINE, CA 92697		PUBLIC CHARITY	UNRESTRICTED	5,000
USARC 43101 GOLDMINE DRIVE BIG BEAR LAKE, CA 92315		PUBLIC CHARITY	UNRESTRICTED	5,000
HOAG HOSPITAL FOUNDATION 500 SUPERIOR AVENUE SUITE 350 NEWPORT BEACH, CA 92663		PUBLIC CHARITY	UNRESTRICTED	3,500
WAKE FOREST UNIVERSITY PO BOX 7227 WINSTONSALEM, NC 27109		PUBLIC CHARITY	UNRESTRICTED	3,500
CHILD ACTION NEPAL PO BOX 39679 HALL LONDON, BRITISH COLUMBIA W264P UK		PUBLIC CHARITY	UNRESTRICTED	2,000
CREST FOREST WOMEN'S FEDERATION PO BOX 4540 CRESTLINE, CA 92325		PUBLIC CHARITY	UNRESTRICTED	2,000
PROVIDENCE TARZANA MEDICAL CENTER FOUNDATION 18321 CLARK STREET TARZANA, CA 91356		PUBLIC CHARITY	UNRESTRICTED	2,000
PEPPERDINE UNIVERSITY 24255 PACIFIC COAST HIGHWAY MALIBU, CA 90263		PUBLIC CHARITY	UNRESTRICTED	1,500
SAN JUAN CAPISTRANO 26801 ORTEGA HIGHWAY SAN JUAN CAPISTRANO, CA 92675		PUBLIC CHARITY	UNRESTRICTED	1,500
AMERICAN RED CROSS INTERNATIONAL 11355 OHIO AVENUE LOS ANGELES, CA 90025		PUBLIC CHARITY	UNRESTRICTED	1,000
BSF INTERNATIONAL 19001 HUEBNER ROAD SAN ANTONIO, TX 78258		PUBLIC CHARITY	UNRESTRICTED	1,000
COMMUNITY OF FAITH CHRISTIAN FELLOWSHIP 410 WASHINGTON STREET BRIGHTON, MA 02135		PUBLIC CHARITY	UNRESTRICTED	1,000
COMMUNITY SERVINGS 18 MARBURY TERRACE JAMAICA PLAIN, MA 02130		PUBLIC CHARITY	UNRESTRICTED	1,000
CRESTLINE FRIENDS OF THE LIBRARY PO BOX 726 CRETLINE, CA 92325		PUBLIC CHARITY	UNRESTRICTED	1,000
<b>Total . . . . .</b>  <b>3a</b>				1,541,074

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)				
<b>a</b> <i>Paid during the year</i>				
DETROIT INSTITUTE OF ART 5200 WOODWARD AVENUE DETROIT, MI 48202		PUBLIC CHARITY	UNRESTRICTED	1,000
INTERNATIONAL MUSEUM OF SURGICAL SCIENCE 1516 N LAKESHORE DRIVE CHICAGO, IL 60610		PUBLIC CHARITY	UNRESTRICTED	1,000
OVERSEAS PRESS CLUB FOUNDATION 40 WEST 45 STREET NEW YORK, NY 10036		PUBLIC CHARITY	UNRESTRICTED	1,000
ST LOUIS UNIVERSITY 1438 S GRAND BLVD ST LOUIS, MO 63104		PUBLIC CHARITY	UNRESTRICTED	1,000
ANTHEUM SPECIAL EVENT NANTUCKET ONE INDIA STREET NANTUCKET, MA 02554		PUBLIC CHARITY	UNRESTRICTED	740
CENTRAL PARK CONSERVATORY 14 EAST 60TH STREET 8TH FLOOR NEW YORK, NY 10022		PUBLIC CHARITY	UNRESTRICTED	500
FELLOWSHIP OF CATHOLIC STUDENTS PO BOX 33656 DENVER, CO 80233		PUBLIC CHARITY	UNRESTRICTED	500
SMALL ARMY FOR A CAUSE 20 NEWBURY STREET 4TH FLOOR BOSTON, MA 02116		PUBLIC CHARITY	UNRESTRICTED	500
VALPARAISO UNIVERSITY SCHOOL OF LAW 656 S GREENWICH STREET VALPARAISO, IN 46383		PUBLIC CHARITY	UNRESTRICTED	500
GREENLIGHT FUND 2 CANAL PARK CAMBRIDGE, MA 02141		PUBLIC CHARITY	UNRESTRICTED	400
<b>Total . . . . .</b>  <b>3a</b>				1,541,074



Form 990PF Part XV Line 3b - Grants and Contributions 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)				
<b>b</b> <i>Approved for future payment</i>				
UNIVERSITY OF SOUTHERN CA ATHLETICS HERITAGE HALL 3501 WATT WAY LOS ANGELES, CA 90089		PUBLIC CHARITY	UNRESTRICTED	400,000
ST MARGARET'S EPISCOPAL SCHOOL31641 LANOVIA AVENUE SAN JUAN CAPISTRANO, CA 92675		PUBLIC CHARITY	UNRESTRICTED	400,000
JOHNS HOPKINS UNIVERSITY3400 N CHARLES STREET 221 MARYLAND HALL BALTIMORE, MD 21218		PUBLIC CHARITY	UNRESTRICTED	147,840
EASTERN VIRGINA MEDICAL SCHOOL721 FAIRFAX AVENUE SUITE 132 NORFOLK, VA 23507		PUBLIC CHARITY	UNRESTRICTED	125,000
BECKMAN RESEARCH INSTITUTE CITY OF HOPE1500 EAST DUARTE ROAD DUARTE, CA 91010		PUBLIC CHARITY	UNRESTRICTED	99,000
RUSH UNIVERSITY MEDICAL CENTER1700 W VAN BUREN SUITE 250 CHICAGO, IL 60612		PUBLIC CHARITY	UNRESTRICTED	82,610
BETTY FORD CENTER FOUNDATION 41990 COOK STREET SUITE C-301 PALM DESERT, CA 92211		PUBLIC CHARITY	UNRESTRICTED	40,000
MARIAN HIGH SCHOOL7225 LAHSER ROAD BLOOMFIELD HILLS, MI 48301		PUBLIC CHARITY	UNRESTRICTED	20,000
LEHIGH UNIVERSITY111 RESEARCH DRIVE BETHLEHAM, PA 18015		PUBLIC CHARITY	UNRESTRICTED	19,500
<b>Total . . . . .</b>  <b>3b</b>				1,333,950

## TY 2010 Accounting Fees Schedule

**Name:** IACocca Family Foundation

**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	8,375	837		7,538

# TY 2010 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	1,007,670	1,007,670
PRIVATELY HELD - BAYHILL	3,449,437	3,449,437

## TY 2010 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	34,230,642	34,230,642
CASH HELD FOR INVESTMENTS	FMV	977,092	977,092

**TY 2010 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	64,613	29,625	34,988	34,988

# **TY 2010 Legal Fees Schedule**

**Name:** IACOCCA FAMILY FOUNDATION

**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	36,211	3,621		32,590

TY 2010 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	1,759,648	1,905,688	1,905,688

**TY 2010 Other Expenses Schedule****Name:** IACocca FAMILY FOUNDATION**EIN:** 38-6071154

Description	Revenue and Expenses per Books	Net Invest ment Income	Adjusted Net Income	Disbursement s for Charitable Purposes
SUPPLIES	9,679	968		8,711
TELEPHONE	13,176	1,318		11,858
POSTAGE, SHIPPING & DELIVERY	6,548	655		5,893
INSURANCE	38,827	3,883		34,944
OUTSIDE COMPUTER SERVICES	11,678	1,168		10,510
PAYROLL PROCESSING FEES	2,426	243		2,183
STORAGE	5,974	597		5,377
MEALS	5,183	518		4,665
MISCELLANEOUS	930	93		837
BANK SERVICE CHARGES	244	24		220
MEMBERSHIP DUES	15,552	1,555		13,997



## TY 2010 Other Income Schedule

**Name:** IACocca FAMILY FOUNDATION

**EIN:** 38-6071154

Description	Revenue And Expenses Per Books	Net Invest ment Income	Adjusted Net Income
INTEREST ON NOTE RECEIVABLE	8,132	8,132	8,132

TY 2010 Other Increases Schedule

**Name:** IACocca Family Foundation

**EIN:** 38-6071154

Description	Amount
UNREALIZED GAIN	5,990,958

## TY 2010 Other Professional Fees Schedule

**Name:** IACOCCA FAMILY FOUNDATION

**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER	10,000	1,000		9,000
INVESTMENT	28,440	28,440		0

**TY 2010 Taxes Schedule****Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	28,515	2,851		25,664
REAL ESTATE TAXES	281	0		281