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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
2011

For calendar year 2011, or tax year beginning 01-01-2011 , and ending 12-31-2011

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)
\$ 34,701,977

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

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	221,112			
	2 Check ☐ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	940,214	940,214		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	-2,342,788			
	b Gross sales price for all assets on line 6a _____ 7,586,106				
	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)	 35,290	35,290		
	12 Total. Add lines 1 through 11	-1,146,172	975,504		
	13 Compensation of officers, directors, trustees, etc	365,333	36,533		328,800
	14 Other employee salaries and wages	141,479	8,550		132,929
	15 Pension plans, employee benefits	99,389	8,200		91,189
	16a Legal fees (attach schedule).	 14,788	1,479		13,309
	b Accounting fees (attach schedule).	 5,250	525		4,725
	c Other professional fees (attach schedule)	 2,095	1,195		900
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	 40,365	3,034		27,331
	19 Depreciation (attach schedule) and depletion	8,766	0		
	20 Occupancy	109,092	10,909		98,183
	21 Travel, conferences, and meetings	21,850	10,925		10,925
	22 Printing and publications				
	23 Other expenses (attach schedule).	 91,216	9,122		82,094
	24 Total operating and administrative expenses. Add lines 13 through 23	899,623	90,472		790,385
	25 Contributions, gifts, grants paid	5,091,910			2,964,875
	26 Total expenses and disbursements. Add lines 24 and 25	5,991,533	90,472		3,755,260
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-7,137,705			
	b Net investment income (if negative, enter -0-)		885,032		
	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	1	Cash—non-interest-bearing	237,990	429,400	429,400
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ <u>1,086,551</u>			
		Less allowance for doubtful accounts ▶ _____	554,304	1,086,551	1,086,551
	4	Pledges receivable ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____			
		Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges		13,514	13,514
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	4,457,107	1,096,389	1,096,389
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____			
Liabilities		Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	35,207,734	30,166,754	30,166,754
	14	Land, buildings, and equipment basis ▶ <u>64,613</u>			
		Less accumulated depreciation (attach schedule) ▶ <u>38,390</u>	34,988	26,223	26,223
	15	Other assets (describe ▶ _____)	1,905,688	1,883,146	1,883,146
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	42,397,811	34,701,977	34,701,977
	17	Accounts payable and accrued expenses			
	18	Grants payable	1,333,950	3,460,985	
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)	1,333,950	3,460,985	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ ☒ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted	41,063,861	31,240,992	
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☐ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg , and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	Total net assets or fund balances (see page 17 of the instructions)	41,063,861	31,240,992	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	42,397,811	34,701,977	

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	41,063,861
2	Enter amount from Part I, line 27a	2	-7,137,705
3	Other increases not included in line 2 (itemize) ▶ _____	3	0
4	Add lines 1, 2, and 3	4	33,926,156
5	Decreases not included in line 2 (itemize) ▶ _____	5	2,685,164
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	31,240,992

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		2009-12-29	2011-12-31
b	VARIOUS		2010-01-01	2011-12-31
c	VARIOUS		2011-01-01	2011-12-31
d	BAYHILL THERAPEUTICS	P	2008-09-09	2011-10-28
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 1,017,346		219,185	798,161
b 3,517,488		3,263,751	253,737
c 2,701,488		2,657,473	44,015
d 349,784		3,000,000	-2,650,216
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			798,161
b			253,737
c			44,015
d			-2,650,216
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	-1,554,303
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))
2010	2,307,911	38,020,563	0 060702
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

2 Total of line 1, column (d).	2	0 349207
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 069841
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	37,496,244
5 Multiply line 4 by line 3.	5	2,618,775
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	8,850
7 Add lines 5 and 6.	7	2,627,625
8 Enter qualifying distributions from Part XII, line 4.	8	3,755,260

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		1	8,850
c		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0
3		Add lines 1 and 2.		3	8,850
4		Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0
5		Tax based on investment income. Subtract line 4 from line 3 If zero or less, enter -0-		5	8,850
6		Credits/Payments			
a		2011 estimated tax payments and 2010 overpayment credited to 2011	6a	42,819	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c		
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments Add lines 6a through 6d.		7	42,819
8		Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	33,969
11		Enter the amount of line 10 to be Credited to 2012 estimated tax ☒ 33,969	Refunded ☐	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)?			No
	If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file Form 1120-POL for this year?	1c		No
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.	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) ☒ 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 2011 or the taxable year beginning in 2011 (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 Form 1041—Check here and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2011, 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	Yes	No
See 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? (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? (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)? (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).			
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.	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 2011?	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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? 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?			
b	If "Yes," did it have excess business holdings in 2011 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 2011.).	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 2011?	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

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	85,500	33,000	0
867 BOYLSTON STREET	MANAGER			
BOSTON,MA 02116	40 00			
NORMA SAKEN	EXECUTIVE	56,078	12,000	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 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	32,599,392
b	Average of monthly cash balances.	1b	2,498,164
c	Fair market value of all other assets (see page 24 of the instructions).	1c	2,969,697
d	Total (add lines 1a, b, and c).	1d	38,067,253
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	38,067,253
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	571,009
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	37,496,244
6	Minimum investment return. Enter 5% of line 5.	6	1,874,812

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	1,874,812
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	8,850
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	8,850
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,865,962
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	1,865,962
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	1,865,962

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	3,755,260
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	0
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	3,755,260
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	8,850
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	3,746,410
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 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				1,865,962
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2011				
a From 2006.				
b From 2007.				407,925
c From 2008.				1,883,210
d From 2009.				1,404,788
e From 2010.				426,896
f Total of lines 3a through e.	4,122,819			
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 3,755,260				
a Applied to 2010, 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 2011 distributable amount.				1,865,962
e Remaining amount distributed out of corpus	1,889,298			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	6,012,117			
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 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions			0	
f Undistributed income for 2011 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 2006 not applied on line 5 or line 7 (see page 27 of the instructions).	0			
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	6,012,117			
10 Analysis of line 9				
a Excess from 2007. . . .				407,925
b Excess from 2008. . . .				1,883,210
c Excess from 2009. . . .				1,404,788
d Excess from 2010. . . .				426,896
e Excess from 2011. . . .				1,889,298

Part XIVPrivate 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 2011, 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) 2011	(b) 2010	(c) 2009	(d) 2008	
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 XVSupplementary 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

Form 990-PF (2011)

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	2,964,875
b Approved for future payment See Additional Data Table				
Total			3b	3,460,985

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
		(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1	Program service revenue					
a	_____					
b	_____					
c	_____					
d	_____					
e	_____					
f	_____					
g	Fees and contracts from government agencies					
2	Membership dues and assessments. . . .					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities. . . .			14	940,214	
5	Net rental income or (loss) from real estate					
a	Debt-financed property.					
b	Not debt-financed property.					
6	Net rental income or (loss) from personal property					
7	Other investment income.					
8	Gain or (loss) from sales of assets other than inventory			18	-2,342,788	
9	Net income or (loss) from special events					
10	Gross profit or (loss) from sales of inventory. .					
11	Other revenue a MISCELLANEOUS _____			01	35,290	
b	_____					
c	_____					
d	_____					
e	_____					
12	Subtotal. Add columns (b), (d), and (e). .		0		-1,367,284	0
13	Total. Add line 12, columns (b), (d), and (e).			13	-1,367,284	

[illegible]

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

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
--------------------------	--------------------------	---------------------------------

May the IRS discuss this return with the preparer shown above? See instructions ☐ Yes ☐ No

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

2011

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	☐ 501(c)() (enter number) organization ☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation ☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation ☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation ☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule—

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II.

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 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) Use duplicate copies of Part III
 additional space is needed

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
<u>1</u>	IACOCCA CLUT FBO ARIANNA ASSAD C/O COMERICA DETROIT, MI 48226 	\$ <u>76,593</u>	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
<u>2</u>	IACOCCA CLUT FBO PARKER LEE HENTZ 201 WASHINGTON STREET BOSTON, MA 02108 	\$ <u>142,393</u>	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
<u> </u>	 	\$ <u> </u>	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
<u> </u>	 	\$ <u> </u>	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
<u> </u>	 	\$ <u> </u>	Person ☐ Payroll ☐ Noncash ☐ (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) Use duplicate copies of Part II if additional space is needed

(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) ➤ \$

Use duplicate copies of Part III if additional space is needed

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

Additional Data

Software ID:
Software Version:
EIN: 38-6071154
Name: IACOCCA FAMILY FOUNDATION

Form 990PF - Special Condition Description:

Special Condition Description

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 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
KATHRYN IACOCCA HENTZ	PRESIDENT 30 00	208,333	32,000	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
JOHN D GERACE	TRUSTEE 1 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/TREASURER 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				
KENNETH ANDERSON	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
MARGARET LAURENCE	EXECUTIVE DIRECTOR 40 00	157,000	17,000	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>				
BOSTON BIOMEDICAL RESEARCH INSTITUTE64 GROVE STREET WATERTOWN,MA 02472		501(C)(3)	RESTRICTED -TYPE 1 DIABETES RESEARCH	250,000
MASSACHUSETTS GENERAL HOSPITAL165 CAMBRIDGE STREET BOSTON,MA 02114		501(C)(3)	RESTRICTED - TYPE 1 DIABETES RESEARCH - DENISE FAUSTMAN	500,000
PRESIDENT & FELLOWS OF MIDDLEBURY COLLEGEOLD CHAPEL 107 MIDDLEBURY,VT 05753		501(C)(3)	RESTRICTED - INTERNSHIPS	50,000
BECKMAN RESEARCH INSTITUTE 1500 EAST DUARTE ROAD DUARTE,CA 91010		501(C)(3)	RESTRICTED - TYPE 1 DIABETES RESEARCH	99,000
EASTERN VIRGINIA MEDICAL SCHOOL721 FAIRFAX AVENUE NORFOLK,VA 23507		501(C)(3)	RESTRICTED -TYPE 1 DIABETES RESEARCH	125,000
JOHNS HOPKINS UNIVERSITY 3400 N CHARLES STREET BALTIMORE,MD 21218		501(C)(3)	RESTRICTED -TYPE 1 DIABETES RESEARCH	147,840
RUSH UNIVERSITY MEDICAL CENTER1700 WEST VAN BUREN STREET CHICAGO,IL 60612		501(C)(3)	RESTRICTED -TYPE 1 DIABETES RESEARCH	82,610
ALZHEIMER'S ASSOCIATION 17771 COWAN IRVINE,CA 92614		501(C)(3)	UNRESTRICTED	9,500
AMERICAN CANCER SOCIETY 1710 WEBSTER STREET OAKLAND,CA 94612		501(C)(3)	UNRESTRICTED	500
AMERICAN FRIENDS OF THE HEBREW UNIVERSITYONE BATTERY PARK PLAZA NEWYORK,NY 10004		501(C)(3)	UNRESTRICTED	5,000
BARBARA SINATRA CHILDREN'S CENTER AT EISENHOWER39000 BOB HOPE DRIVE RANCHO MIRAGE,CA 92270		501(C)(3)	UNRESTRICTED	5,000
BELIEVE IN SOBRIETY30025 ALICIA PARKWAY LAGUNA NIGUEL,CA 93677		501(C)(3)	UNRESTRICTED	3,000
BERKSHIRE HILLS MUSIC ACADEMYPO BOX 460 DOVER,MA 02030		501(C)(3)	UNRESTRICTED	2,500
BOSTON UNIVERSITY595 COMMONWEALTH AVENUE BOSTON,MA 02215		501(C)(3)	RESTRICTED - LOUIS E LATAIF SMG ALUMNI SCHOLARSHIP FUND	5,000
BOYS & GIRLS CLUB OF BROWARD COUNTY877 NW 61 STREET FORT LAUDERDALE,FL 33309		501(C)(3)	UNRESTRICTED	5,000
BSF INTERNATIONAL19001 HUEBNER ROAD SAN ANTONIO,TX 78258		501(C)(3)	UNRESTRICTED	1,000
CANYON CLUB INC20456 LAGUNA CANYON ROAD LAGUNA BEACH,CA 92651		501(C)(3)	UNRESTRICTED	2,500
CANYON CLUB INC20456 LAGUNA CANYON ROAD LAGUNA BEACH,CA 92651		501(C)(3)	UNRESTRICTED	1,000
CANYON CLUB INC20456 LAGUNA CANYON ROAD LAGUNA BEACH,CA 92651		501(C)(3)	UNRESTRICTED	4,000
CAROLINA HEALTHCARE FOUNDATION1221 E MOREHEAD STREET CHARLOTTE,NC 28204		501(C)(3)	UNRESTRICTED	2,500
CATHOLIC FAITH APPEAL1000 PINEBROOK ROAD VENICE,FL 34285		501(C)(3)	UNRESTRICTED	5,000
CENTRAL PARK CONSERVATORY 14 EAST 60TH STREET NEWYORK,NY 10022		501(C)(3)	UNRESTRICTED	500
CHRISTOPHER CATANESE CHILDREN'S FOUNDATIONPO BOX 2661 WESTWOOD,MA 02090		501(C)(3)	UNRESTRICTED	500
CITY OF HOPE1055 WILSHIRE BLVD LOS ANGELES,CA 90017		501(C)(3)	UNRESTRICTED	250
CITY OF HOPE MEDICAL CENTER 1055 WILSHIRE BLVD LOS ANGELES,CA 90017		501(C)(3)	UNRESTRICTED	5,000
CLERGY BENEFIT TRUST66 BROOKS DRIVE BRAINTREE,MA 02184		501(C)(3)	UNRESTRICTED	1,000
COURAGEOUS HEALERS FOUNDATIONPO BOX 5365 LA QUINTA,CA 92248		501(C)(3)	UNRESTRICTED	1,500
CRANBROOK SCHOOL520 LONE PINE ROAD BLOOMFIELD HILLS,MI 48304		501(C)(3)	UNRESTRICTED	10,000
DESALES UNIVERSITY2755 STATION AVENUE CENTER VALLEY,PA 18034		501(C)(3)	UNRESTRICTED	5,000
GEORGE W BUSH PRESIDENTIAL CENTERPO BOX 600610 DALLAS,TX 75206		501(C)(3)	UNRESTRICTED	1,000

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>				
GLOBAL GRINS18101 VON KARMAN IRVINE,CA 92612		501(C)(3)	UNRESTRICTED	1,000
GROTON SCHOOL282 FARMERS ROW GROTON,MA 01450		501(C)(3)	RESTRICTED - THE MATH AND SCIENCE BUILDING	5,000
GUIDE DOGS OF AMERICA13445 GLENOAKS BLVD SYLMAR,CA 91342		501(C)(3)	UNRESTRICTED	5,000
HOAG HOSPITAL FOUNDATION500 SUPERIOR AVENUE NEWPORT BEACH,CA 92663		501(C)(3)	RESTRICTED - MARY & DICK ALLEN DIABETES CENTER	5,000
HOAG HOSPITAL FOUNDATION500 SUPERIOR AVENUE NEWPORT BEACH,CA 92663		501(C)(3)	RESTRICTED - MARY & DICK ALLEN DIABETES CENTER	5,000
HOAG HOSPITAL FOUNDATION500 SUPERIOR AVENUE NEWPORT BEACH,CA 92663		501(C)(3)	UNRESTRICTED	1,000
HOLY FAITH COMMUNICATIONS6325 SHERIDAN DRIVE WILLIAMSVILLE,NY 14221		501(C)(3)	UNRESTRICTED	250
JEWISH FAMILY SERVICE OF LOS ANGELES3580 WILSHIRE BLVD LOS ANGELES,CA 90010		501(C)(3)	UNRESTRICTED	5,000
KEEP MEMORY ALIVE888 W BONNEVILLE AVENUE LAS VEGAS,NV 89106		501(C)(3)	UNRESTRICTED	10,000
LA COUNTY POLICE CANINE ASSOCIATION1223 WILSHIRE BLVD LOS ANGELES,CA 90403		501(C)(3)	UNRESTRICTED	1,000
LANDMARK SCHOOLPO BOX 227 PRIDES CROSSING,MA 01965		501(C)(3)	UNRESTRICTED	12,500
MAKE A WISH1780 MORIAH WOODS BLVD MEMPHIS,TN 38117		501(C)(3)	UNRESTRICTED	875
MAKE IT RIGHT FOUNDATIONPO BOX 58009 NEW ORLEANS,LA 70158		501(C)(3)	UNRESTRICTED	2,500
MARINE CORP SCHOLARSHIP FOUNDATION909 N WASHINGTON STREET ALEXANDRIA,VA 22314		501(C)(3)	RESTRICTED - LEO KELMESON SCHOLARSHHIP	20,000
MCLEAN HOSPITAL115 MILL STREET BELMONT,MA 02478		501(C)(3)	RESTRICTED - COLLEGE MENTAL HEALTH PROGRAM	10,000
MSPCA - ANGELL350 SOUTH HUNTINGTON AVENUE BOSTON,MA 02130		501(C)(3)	UNRESTRICTED	1,000
MUSIC CENTER - ASCAP FOUNDATION135 NORTH GRAND AVENUE LOS ANGELES,CA 90012		501(C)(3)	UNRESTRICTED	5,000
NANTUCKET ATHENEUMONE INDIA STREET NANTUCKET,MA 02554		501(C)(3)	UNRESTRICTED	500
NANTUCKET COTTAGE HOSPITAL FOUNDATION57 PROSPECT STREET NANTUCKET,MA 02554		501(C)(3)	RESTRICTED - 15TH ANNUAL POPS	13,250
NANTUCKET HISTORICAL ASSOCIATIONPO BOX 1016 NANTUCKET,MA 02554		501(C)(3)	UNRESTRICTED	1,000
NATIONAL ITALIAN AMERICAN FOUNDATION1860 19TH STREET NW WASHINGTON,DC 20009		501(C)(3)	UNRESTRICTED	2,500
NATIONAL STUTTERING ASSOCIATION119 W 40TH STREET NEW YORK,NY 10018		501(C)(3)	UNRESTRICTED	5,000
PACIFIC MARINE MAMMAL CENTER20612 LAGUNA CANYON ROAD LAGUNA BEACH,CA 92651		501(C)(3)	UNRESTRICTED	500
PAN-MASSACHUSETTS CHALLENGE77 4TH AVENUE NEEDHAM,MA 02494		501(C)(3)	UNRESTRICTED	500
PARENTS AGAINST LEUKEMIA14609 DEERVALE PLACE SHERMAN OAKS,CA 91403		501(C)(3)	UNRESTRICTED	5,000
PAT MOORE FOUNDATION2568 NEWPORT BLVD COSTA MESA,CA 92627		501(C)(3)	UNRESTRICTED	5,000
PEPPERDINE UNIVERSITY24255 PACIFIC COAST HIGHWAY MALIBU,CA 90263		501(C)(3)	UNRESTRICTED	2,000
PETERSON AUTOMOTIVE MUSEUM FOUNDATION6060 WILSHIRE BLVD LOS ANGELES,CA 90036		501(C)(3)	UNRESTRICTED	10,000
PROMISES FOUNDATION4419 INGLEWOOD BLVD LOS ANGELES,CA 90066		501(C)(3)	UNRESTRICTED	10,000
PROSTATE CANCER FOUNDATION1250 FOURTH STREET SANTA MONICA,CA 90401		501(C)(3)	UNRESTRICTED	5,000

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>				
PROSTATE CANCER FOUNDATION 1250 FOURTH STREET SANTA MONICA,CA 90401		501(C)(3)	UNRESTRICTED	5,000
PROVIDENCE TARZANA MEDICAL CENTER 18321 CLARK STREET TARZANA,CA 91356		501(C)(3)	UNRESTRICTED	1,000
SACRED HEART CATHOLIC CHURCH 43-775 DEEP CANYON ROAD PALM DESERT,CA 92260		501(C)(3)	UNRESTRICTED	25,000
SACRED HEART CATHOLIC CHURCH 43-775 DEEP CANYON ROAD PALM DESERT,CA 92260		501(C)(3)	UNRESTRICTED	25,000
SAIL TO PREVAIL PO BOX 1264 NEWPORT,RI 02840		501(C)(3)	UNRESTRICTED	250
SAINT FRANCIS CHAPEL 800 BOYLSTON STREET BOSTON,MA 02199		501(C)(3)	UNRESTRICTED	5,000
ST JOSEPH'S PARISH 1382 HIGHLAND AVENUE NEEDHAM,MA 02492		501(C)(3)	UNRESTRICTED	25,000
ST JOSEPH'S PARISH 1382 HIGHLAND AVENUE NEEDHAM,MA 02492		501(C)(3)	UNRESTRICTED	25,000
ST JUDE CHILDREN'S - RESEARCH HOSPITAL 12365 LEWIS STREET GARDEN GROVE,CA 92840		501(C)(3)	UNRESTRICTED	5,000
ST MARGARET'S EPISCOPAL SCHOOL 31641 LA NOVIA SAN JUAN CAPISTRANO,CA 92675		501(C)(3)	UNRESTRICTED	2,500
ST MONICA CATHOLIC HIGH SCHOOL 1030 LINCOLN BLVD SANTA MONICA,CA 90403		501(C)(3)	UNRESTRICTED	8,150
ST SEBASTIAN'S SCHOOL 1191 GREENADALE AVENUE NEEDHAM,MA 02492		501(C)(3)	UNRESTRICTED	1,000
ST SEBASTIAN'S SCHOOL 1191 GREENADALE AVENUE NEEDHAM,MA 02492		501(C)(3)	UNRESTRICTED	50,000
ST SEBASTIAN'S SCHOOL 1191 GREENADALE AVENUE NEEDHAM,MA 02492		501(C)(3)	UNRESTRICTED	650
ST SEBASTIAN'S SILENT AUCTION 1191 GREENADALE AVENUE NEEDHAM,MA 02492		501(C)(3)	UNRESTRICTED	1,000
THE BRENT SHAPIRO FOUNDATION 10250 CONSTELLATION BLVD LOS ANGELES,CA 90067		501(C)(3)	UNRESTRICTED	5,000
THE LEUKEMIA & LYMPHOMA SOCIETY 1311 MAMARONECK AVENUE WHITE PLAINS,NY 10605		501(C)(3)	UNRESTRICTED	500
THE REACH FOUNDATION 500 OLD NEWPORT BLVD NEWPORT BEACH,CA 92663		501(C)(3)	UNRESTRICTED	10,000
UCLA UNICAMP 900 HILGRID AVENUE LOS ANGELES,CA 90024		501(C)(3)	UNRESTRICTED	2,500
UNIVERSITY OF CA IRVINE 101 ACADEMY IRVINE,CA 92617		501(C)(3)	RESTRICTED - TYPE 1 DIABETES RESEARCH	5,000
UNIVERSITY OF SOUTHERN CALIFORNIA HERITAGE HALL MC 0602 LOS ANGELES,CA 90089		501(C)(3)	UNRESTRICTED	1,000
VALPARAISO UNIVERSITY 656 S GREENWICH STREET VALPARAISO,IN 46383		501(C)(3)	RESTRICTED - THE KEN AND SUSAN ANDERSON TEACHER / SCHOLAR FUND	500
VIRGINIA ROBINSON GARDENS 1008 ELDEN WAY BEVERLY HILLS,CA 90210		501(C)(3)	UNRESTRICTED	5,000
WAKE FOREST UNIVERSITY PO BOX 7227 WINSTON SALEM,NC 27109		501(C)(3)	UNRESTRICTED	10,000
WORLD VISION PO BOX 70102 TACOMA,WA 98481		501(C)(3)	UNRESTRICTED	250
YELLOWSTONE WOMEN'S FIRST STEP HOUSE 154 EAST BAY STREET COSTA MESA,CA 92627		501(C)(3)	UNRESTRICTED	5,000
BETTY FORD CENTER 41990 COOK STREET PALM DESERT,CA 92211		501(C)(3)	UNRESTRICTED	10,000
UNIVERSITY OF SOUTHERN CALIFORNIA HERITAGE HALL MC 0602 LOS ANGELES,CA 90089		501(C)(3)	RESTRICTED - 2 ATHLETIC SCHOLARSHIPS	100,000
ST MARGARET'S EPISCOPAL SCHOOL 31641 LANOVIA AVENUE SAN JUAN CAPISTRANO,CA 92675		501(C)(3)	RESTRICTED - DINING CENTER	100,000
MARIAN HIGH SCHOOL 7225 LAHSER ROAD BLOOMFIELD HILLS,MI 48301		501(C)(3)	UNRESTRICTED	10,000

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>				
LEHIGH UNIVERSITY27 MEMORIAL DRIVE WEST BETHLEHEM,PA 18018		501(C)(3)	RESTRICTED - INTERNSHIPS	1,000,000
DETROIT INSTITUTE OF OPHTHALMOLOGY15415 EAST JEFFERSON AVENUE GROSSE POINTE PARK,MI 48230		501(C)(3)	RESTRICTED - EYE AND AUTO SYMPOSIUM	20,000
LEHIGH UNIVERSITY111 RESEARCH DRIVE BETHLEHEM,PA 18015		501(C)(3)	RESTRICTED - SCHOLARSHIPS	19,500
Total			3a	2,964,875

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 <i>Approved for future payment</i>				
BOSTON BIOMEDICAL RESEARCH INSTITUTE64 GROVE STREET WATERTOWN,MA 02472		501(C)(3)	RESTRICTED -TYPE 1 DIABETES RESEARCH	250,000
MASSACHUSETTS GENERAL HOSPITAL165 CAMBRIDGE STREET BOSTON,MA 02114		501(C)(3)	RESTRICTED - TYPE 1 DIABETES RESEARCH - DENISE FAUSTMAN	2,500,000
PRESIDENT & FELLOWS OF MIDDLEBURY COLLEGEOLD CHAPEL 107 MIDDLEBURY,VT 05753		501(C)(3)	RESTRICTED - INTERNSHIPS	50,000
BETTY FORD CENTER41990 COOK STREET PALM DESERT,CA 92211		501(C)(3)	UNRESTRICTED	30,000
UNIVERSITY OF SOUTHERN CALIFORNIAHERITAGE HALL MC 0602 LOS ANGELES,CA 90089		501(C)(3)	RESTRICTED - 2 ATHLETIC SCHOLARSHIPS	300,000
ST MARGARET'S EPISCOPAL SCHOOL31641 LANOVIA AVENUE SAN JUAN CAPISTRANO,CA 92675		501(C)(3)	RESTRICTED - DINING CENTER	300,000
MARIAN HIGH SCHOOL7225 LAHSER ROAD BLOOMFIELD HILLS,MI 48301		501(C)(3)	UNRESTRICTED	10,000
LEHIGH UNIVERSITY111 RESEARCH DRIVE BETHLEHEM,PA 18015		501(C)(3)	RESTRICTED - SCHOLARSHIPS	20,985
Total  3b				3,460,985

TY 2011 Accounting Fees Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	5,250	525		4,725

**TY 2011 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	1,096,389	1,096,389
PRIVATELY HELD - BAYHILL	0	0

TY 2011 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	28,524,386	28,524,386
CASH HELD FOR INVESTMENTS	FMV	1,642,368	1,642,368

TY 2011 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	38,390	26,223	26,223

TY 2011 Legal Fees Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	14,788	1,479		13,309

TY 2011 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	1,905,688	1,883,146	1,883,146

TY 2011 Other Decreases Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Description	Amount
UNREALIZED LOSS	2,685,164

TY 2011 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	9,566	957		8,609
TELEPHONE	7,624	762		6,862
POSTAGE, SHIPPING & DELIVERY	5,655	566		5,089
INSURANCE	47,267	4,727		42,540
OUTSIDE COMPUTER SERVICES	7,759	776		6,983
PAYROLL PROCESSING FEES	2,309	231		2,078
STORAGE	3,924	392		3,532
MISCELLANEOUS	5,754	575		5,179
BANK SERVICE CHARGES	683	68		615
MEMBERSHIP DUES	675	68		607

TY 2011 Other Income Schedule

Name: IACocca FAMILY FOUNDATION

EIN: 38-6071154

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS	35,290	35,290	35,290

TY 2011 Other Professional Fees Schedule**Name:** IACocca FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER	1,000	100		900
INVESTMENT	1,095	1,095		0

TY 2011 Taxes Schedule**Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	30,343	3,034		27,309
REAL ESTATE TAXES	22	0		22
EXCISE TAX	10,000	0		0