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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

2012

Open to Public Inspection

For calendar year 2012, or tax year beginning 01-01-2012 , and ending 12-31-2012

Name of foundation IACOCCA FAMILY FOUNDATION		A Employer identification number 38-6071154	
Number and street (or P O box number if mail is not delivered to street address) 867 BOYLSTON STREET 6TH FLOOR		B Telephone number (see instructions) (617) 267-7747	
City or town, state, and ZIP code BOSTON, MA 02116		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) <input checked="" type="checkbox"/> \$ 35,515,140	J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

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 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)	215,842			
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	1,009,913	1,009,913		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	589,555			
	b Gross sales price for all assets on line 6a _____ 3,899,828				
	7 Capital gain net income (from Part IV, line 2)		589,555		
	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)	9,201	9,201		
	12 Total. Add lines 1 through 11	1,824,511	1,608,669		
	13 Compensation of officers, directors, trustees, etc	375,131	37,513		337,618
	14 Other employee salaries and wages	110,975	8,697		102,278
	15 Pension plans, employee benefits	52,254	3,740		48,514
	16a Legal fees (attach schedule)	114,037	11,404		102,633
	b Accounting fees (attach schedule)	5,325	533		4,792
	c Other professional fees (attach schedule)	17,136	1,836		15,300
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	37,795	2,779		25,016
	19 Depreciation (attach schedule) and depletion . . .	5,959	0		
	20 Occupancy	87,148	8,715		78,433
	21 Travel, conferences, and meetings	29,836	14,918		14,918
	22 Printing and publications				
	23 Other expenses (attach schedule)	128,000	8,401		119,599
	24 Total operating and administrative expenses. Add lines 13 through 23	963,596	98,536		849,101
	25 Contributions, gifts, grants paid	1,446,285			2,962,270
	26 Total expenses and disbursements. Add lines 24 and 25	2,409,881	98,536		3,811,371
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-585,370			
	b Net investment income (if negative, enter -0-)		1,510,133		
	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	429,400	914,088	914,088
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶ 260,353			
		Less allowance for doubtful accounts ▶	586,551	260,353	260,353
	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	7,284	7,284
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	1,096,389	942,428	942,428
	c	Investments—corporate bonds (attach schedule).			
	11	Investments—land, buildings, and equipment basis ▶			
	Less accumulated depreciation (attach schedule) ▶				
12	Investments—mortgage loans				
13	Investments—other (attach schedule)	30,666,754	31,421,661	31,421,661	
14	Land, buildings, and equipment basis ▶ 72,950				
	Less accumulated depreciation (attach schedule) ▶ 44,349	26,223	28,601	28,601	
15	Other assets (describe ▶)	1,883,146	1,940,725	1,940,725	
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	34,701,977	35,515,140	35,515,140	
Liabilities	17	Accounts payable and accrued expenses		1,760	
	18	Grants payable	3,460,985	1,945,000	
	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)	3,460,985	1,946,760	
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.				
	24	Unrestricted	31,240,992	33,568,380	
	25	Temporarily restricted			
	26	Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> 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)	31,240,992	33,568,380	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	34,701,977	35,515,140	

Part III Analysis of Changes in Net Assets or Fund Balances		
1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year’s return)	1 31,240,992
2	Enter amount from Part I, line 27a	2 -585,370
3	Other increases not included in line 2 (itemize) ▶	3 2,912,758
4	Add lines 1, 2, and 3	4 33,568,380
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 33,568,380

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		2012-01-01	2012-12-31
b	VARIOUS		2011-01-01	2012-12-31
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 60,000		62,790	-2,790
b 3,839,828		3,247,483	592,345
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			-2,790
b			592,345
c			
d			
e			

2 Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	589,555
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 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))
2011	3,746,410	37,496,244	0 099914
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

2 Total of line 1, column (d).	2	0 402230
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 080446
4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5.	4	36,412,759
5 Multiply line 4 by line 3.	5	2,929,261
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	15,101
7 Add lines 5 and 6.	7	2,944,362
8 Enter qualifying distributions from Part XII, line 4.	8	3,819,708

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

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 <input type="checkbox"/> 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 <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	15,101
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	15,101
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	15,101
6		Credits/Payments			
a		2012 estimated tax payments and 2011 overpayment credited to 2012	6a	43,969	
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	43,969
8		Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached		8	
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	28,868
11		Enter the amount of line 10 to be Credited to 2013 estimated tax <input checked="" type="checkbox"/> 28,868	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)?			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 <input checked="" type="checkbox"/> \$ 0 (2) On foundation managers <input checked="" 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 checked="" 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 instructions) <input checked="" 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 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? 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 instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶IACOCCAFOUNDATION.ORG				
14	The books are in care of ▶THE FOUNDATION Telephone no ▶(617) 267-7747 Located at ▶867 BOYLSTON STREET 6TH FLOOR BOSTON MA ZIP +4 ▶02116			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year ▶	15		
16	At any time during calendar year 2012, 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 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? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2012?.	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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see 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 type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 2012 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 2012.</i>).	3b		
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 2012?	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))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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 instructions).	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?	5b		
	Organizations relying on a current notice regarding disaster assistance check here.	<input checked="" type="checkbox"/>		
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?	<input type="checkbox"/> Yes <input type="checkbox"/> 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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	6b		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?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?	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 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 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	86,975	37,399	0
867 BOYLSTON STREET	MANAGER			
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 instructions). If none, enter "NONE".		
(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
BURNS & LEVINSON LLP	LEGAL SERVICES	114,904
125 SUMMER STREET		
BOSTON,MA 02110		
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 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 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	31,181,808
b	Average of monthly cash balances.	1b	3,084,382
c	Fair market value of all other assets (see instructions).	1c	2,701,078
d	Total (add lines 1a, b, and c).	1d	36,967,268
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	36,967,268
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	554,509
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	36,412,759
6	Minimum investment return. Enter 5% of line 5.	6	1,820,638

Part XI

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

1	Minimum investment return from Part X, line 6.	1	1,820,638
2a	Tax on investment income for 2012 from Part VI, line 5.	2a	15,101
b	Income tax for 2012 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	15,101
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,805,537
4	Recoveries of amounts treated as qualifying distributions.	4	1,092
5	Add lines 3 and 4.	5	1,806,629
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,806,629

Part XII

Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes		
a	Expenses, contributions, gifts, etc —total from Part I, column (d), line 26.	1a	3,811,371
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	8,337
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	3,819,708
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 instructions).	5	15,101
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	3,804,607
Note: The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years			

Part XIII

Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7				1,806,629
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2012				
a From 2007.				407,925
b From 2008.				1,883,210
c From 2009.				1,404,788
d From 2010.				426,896
e From 2011.				1,889,298
f Total of lines 3a through e.	6,012,117			
4 Qualifying distributions for 2012 from Part XII, line 4 ▶ \$ 3,819,708				
a Applied to 2011, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2012 distributable amount.				1,806,629
e Remaining amount distributed out of corpus	2,013,079			
5 Excess distributions carryover applied to 2012 (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	8,025,196			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013.				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions). . . .	407,925			
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a.	7,617,271			
10 Analysis of line 9				
a Excess from 2008. . . .				1,883,210
b Excess from 2009. . . .				1,404,788
c Excess from 2010. . . .				426,896
d Excess from 2011. . . .				1,889,298
e Excess from 2012. . . .				2,013,079

Part XIVPrivate Operating Foundations (see 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 2012, 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) 2012	(b) 2011	(c) 2010	(d) 2009	
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 instructions.)

1Information 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

2Information 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 instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a

The name, address, and telephone number or e-mail 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

FEBRUARY 1

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

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

Form **990-PF** (2012)

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See 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	1,009,913	
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	589,555	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory.					
11 Other revenue a MISCELLANEOUS _____			01	9,201	
b _____					
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e).		0		1,608,669	0
13 Total. Add line 12, columns (b), (d), and (e).			13	1,608,669	1,608,669

[illegible]

<p>1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?</p> <p>a Transfers from the reporting foundation to a noncharitable exempt organization of</p> <p>(1) Cash.</p> <p>(2) Other assets.</p> <p>b Other transactions</p> <p>(1) Sales of assets to a noncharitable exempt organization.</p> <p>(2) Purchases of assets from a noncharitable exempt organization.</p> <p>(3) Rental of facilities, equipment, or other assets.</p> <p>(4) Reimbursement arrangements.</p> <p>(5) Loans or loan guarantees.</p> <p>(6) Performance of services or membership or fundraising solicitations.</p> <p>c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.</p> <p>d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received</p>		Yes	No
	1a(1)		No
	1a(2)		No
	1b(1)		No
	1b(2)		No
	1b(3)		No
	1b(4)		No
	1b(5)		No
	1b(6)		No
	1c		No

[illegible]

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

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

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

*****	2013-07-09	*****
Signature of officer or trustee	Date	Title

May the IRS discuss this return with the preparer shown below (see instr.)? ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input checked="checked" type="checkbox"/>	PTIN
	THOMAS WASHBURN CPA	THOMAS WASHBURN CPA	2013-07-09		P00537319
	Firm's name <input type="checkbox"/>	ALEXANDER ARONSON FINNING & CO PC		Firm's EIN <input type="checkbox"/> 04-2571780	
		21 EAST MAIN STREET			
Firm's address <input type="checkbox"/>	WESTBORO, MA 01581		Phone no (508) 366-9100		

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 20 00	156,250	37,150	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	162,375	19,356	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>				
CHILDREN'S HOSPITAL OF ORANGE COUNTY 455 S MAIN STREET ORANGE,CA 92868		501(C)(3)	CHOC CHERISHES CHILDREN 2012 / GIFT OF DETERMINATION	2,000
THE REACH FOUNDATION 500 OLD NEWPORT BLVD NEWPORT BEACH,CA 92663		501(C)(3)	WELCOME BACK SCHOLARSHIP PROGRAM	5,000
ST JOSEPH'S PARISH 1382 HIGHLAND AVENUE NEEDHAM,MA 02492		501(C)(3)	2012 MARDI GRAS AUCTION	2,000
CHILD CENTER OF NEW YORK 60-02 QUEENS BLVD WOODSIDE,NY 11377		501(C)(3)	2012 DONATION	10,000
YOUK'S KIDS PO BOX 600311 NEWTONVILLE,MA 02460		501(C)(3)	2012 NOT YOUR AVERAGE IDOL	500
BROADCASTERS FOUNDATION OF AMERICA 125 WEST 55TH STREET NEW YORK,NY 10019		501(C)(3)	2012 BROADCASTERS FOUNDATION OF AMERICA CELEBRITY GOLF TOURNAMENT	3,760
BARBARA SINATRA CHILDREN'S CENTER AT EISENHOWER 39000 BOB HOPE DRIVE RANCHO MIRAGE,CA 92270		501(C)(3)	2012 DONATION	5,000
ADVERTISING EDUCATION FOUNDATION 220 E 42ND STREET NEW YORK,NY 10017		501(C)(3)	LEO KELMENSON SYMPOSIUM 2012	10,000
ST MONICA CATHOLIC HIGH SCHOOL 1030 LINCOLN BLVD SANTA MONICA,CA 90403		501(C)(3)	2012 DONATION - SCHOLARSHIP	8,750
HOAG HOSPITAL FOUNDATION 500 SUPERIOR AVENUE NEWPORT BEACH,CA 92663		501(C)(3)	2012 25TH ANNIVERSARY CIRCLE 1000 FOUNDERS' BRUNCH	1,500
USA VOLLEYBALL 4065 SINTON ROAD COLORADO SPRINGS,CO 80907		501(C)(3)	WOMEN'S NATIONAL TEAM	10,000
ALZHEIMER'S ASSOCIATION 17771 COWAN IRVINE,CA 92614		501(C)(3)	2012 DONATION - AN AFFAIR TO REMEMBER GALA	16,000
SHERIFF'S YOUTH FOUNDATION 419 N LARCHMONT BLVD LOS ANGELES,CA 90004		501(C)(3)	2012 DONATION	5,500
USS MIDWAY 910 N HARBOR DRIVE SAN DIEGO,CA 92101		501(C)(3)	2012 DONATION	3,000
HEROES HEALTH FUND 236 WEST MOUNTAIN STREET PASADENA,CA 02116		501(C)(3)	NY RESCUE WORKERS DETOXIFICATION & GULF COAST DETOXIFICATION PROJECTS	5,000

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

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Name and address (home or business)				
a <i>Paid during the year</i>				
EGOSCUE FOUNDATION 12230 EL CAMINO REAL SAN DIEGO,CA 92130		501(C)(3)	2012 DONATION	1,500
ST VINCENT'S MEALS ON WHEELS 2200 WEST THIRD STREET LOS ANGELES,CA 90057		501(C)(3)	2012 DONATION	5,000
ORANGE COUNTY MUSEUM OF ART 850 SAN CLEMENTE DRIVE NEWPORT BEACH,CA 92660		501(C)(3)	ART OF DINING 2012	2,000
SAN GABRIEL JUNIOR GOLF INC 538 BRADBURY ROAD MONROVIA,CA 90019		501(C)(3)	2012 DONATION	5,000
UCLA DAVID GEFFEN SCHOOL OF MEDICINE 10945 LECONTE AVENUE LOS ANGELES,CA 90095		501(C)(3)	DEMENTIA CARE PROGRAM	50,000
ST MARGARET'S EPISCOPAL SCHOOL 31641 LANOVIA SAN JUAN CAPISTRANO,CA 92675		501(C)(3)	2012 DONATION	2,500
NANTUCKET COTTAGE HOSPITAL FOUNDATION 57 PROSPECT STREET NANTUCKET,MA 02554		501(C)(3)	2012 DONATION	13,250
NANTUCKET NEWSCHOOL 15 NABADEER FARM ROAD NANTUCKET,MA 02554		501(C)(3)	5TH ANNUAL COMEDY FESTIVAL	2,500
NANTUCKET COMEDY FESTIVAL PO BOX 2336 NANTUCKET,MA 02584		501(C)(3)	IN SUPPORT OF THE 2012 DANCE FESTIVAL	500
NANTUCKET ATHENEUM ONE INDIA STREET NANTUCKET,MA 02554		501(C)(3)	2012 DONATION	500
KEEP MEMORY ALIVE 888 W BONNEVILLE AVENUE LAS VEGAS,NV 89106		501(C)(3)	2012 DONATION	10,000
FRIENDS OF ROBINSON GARDENS 1008 ELDEN WAY BEVERLY HILLS,CA 90210		501(C)(3)	2012 DONATION	5,000
ZENO MOUNTAIN FARMS 950 ZENO ROAD LINCOLN,VT 05443		501(C)(3)	2012 DONATION	10,000
PARENTS AGAINST LEUKEMIA 14609 DEERVALE PLACE SHERMAN OAKS,CA 91403		501(C)(3)	2012 DONATION	5,000
AMERICAN FRIENDS OF THE HEBREW UNIVERSITY 11500 W OLYMPIC BLVD LOS ANGELES,CA 90064		501(C)(3)	2012 DONATION	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>				
CHILD HELP 15757 N 78TH STREET SCOTTSDALE,AZ 85260		501(C)(3)	2012 DONATION	1,000
CLERGY BENEFIT TRUST 66 BROOKS DRIVE BOSTON,MA 02184		501(C)(3)	THE CLERGY FUNDS	2,000
BROADCASTERS FOUNDATION OF AMERICA 125 WEST 55TH STREET NEW YORK,NY 10019		501(C)(3)	2012 DONATION	3,500
LUPUS LA 8383 WILSHIRE BLVD BEVERLY HILLS,CA 90211		501(C)(3)	IN SUPPORT OF KELLY STONE	5,000
LUPUS LA 8383 WILSHIRE BLVD BEVERLY HILLS,CA 90211		501(C)(3)	IN SUPPORT OF KELLY STONE	5,000
PAT MOORE FOUNDATION 2568 NEWPORT BLVD COSTA MESA,CA 92627		501(C)(3)	2012 DONATION	5,000
YELLOWSTONE RECOVERY 154 E BAY STREET COSTA MESA,CA 92627		501(C)(3)	2012 DONATION	2,000
THE MOUNT TWO PLUNKETT STREET LENOX,MA 01240		501(C)(3)	IN SUPPORT OF EDITH WHARTON 150TH BIRTHDAY CELEBRATION	400
HOAG HOSPITAL FOUNDATION 500 SUPERIOR AVENUE NEWPORT BEACH,CA 92663		501(C)(3)	IN SUPPORT OF THE MARY & DICK ALLEN DIABETES CENTER	5,000
HOAG HOSPITAL FOUNDATION 500 SUPERIOR AVENUE NEWPORT BEACH,CA 92663		501(C)(3)	IN SUPPORT OF THE MARY & DICK ALLEN DIABETES CENTER	5,000
GUIDE DOGS OF AMERICA 13445 GLENOAKS BLVD SYLMAR,CA 91342		501(C)(3)	IN SUPPORT OF THE SAN GABRIEL CHAPTER	5,000
SMALL ARMY FOR A CAUSE 300 MASSACHUSETTS AVENUE BOSTON,MA 02115		501(C)(3)	IN SUPPORT OF BE BOLD, BE BALD	5,000
THE MOUNT TWO PLUNKETT STREET LENOX,MA 01240		501(C)(3)	IN SUPPORT OF EDITH WHARTON 150TH BIRTHDAY CELEBRATION	500
VAIL VALLEY MEDICAL CENTER PO BOX 1529 VAIL,CO 81658		501(C)(3)	2012 DONATION	500
BELIEVE IN SOBRIETY 30025 ALICIA PARKWAY LAGUNA NIGUEL,CA 93677		501(C)(3)	2012 DONATION	2,500


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>				
CANYON CLUB 20456 LAGUNA CANYON ROAD LAGUNA BEACH,CA 92651		501(C)(3)	2012 DONATION	4,000
ST SEBASTIAN'S SCHOOL 1191 GREENDALE AVENUE NEEDHAM,MA 02492		501(C)(3)	2012 DONATION	25,000
ST JOSEPH'S PARISH 1382 HIGHLAND AVENUE NEEDHAM,MA 02492		501(C)(3)	2012 DONATION	25,000
LEAGUE FOR ANIMAL PROTECTION PO BOX 561 FINCASTLE,VA 24090		501(C)(3)	2012 DONATION	5,000
ARCHDIOCESE OF BOSTON 66 BROOKS DRIVE BRAINTREE,MA 02184		501(C)(3)	MOTHER OLGA'S MINISTRY	25,000
BABY BUGGY 306 W 37TH STREET 8TH FLOOR NEWYORK,NY 10018		501(C)(3)	CHILDREN AFFECTED BY SUPERSTORM SANDY	100,000
BU SCHOOL OF MGMT 595 COMMONWEALTH AVENUE BOSTON,MA 02215		501(C)(3)	LOUISE LATAIF ALUMNI BOARD SCHOLARSHIP FUND	5,000
GROTON SCHOOL 282 FARMERS ROW GROTON,MA 01450		501(C)(3)	SUPPORT OF STEM BUILDING	5,000
LANCE LYONS RECOVERY TEAM PO BOX 54552 IRVINE,CA 92619		501(C)(3)	2012 DONATION	1,000
NANTUCKET NEWSCHOOL 15 NABADEER FARM ROAD NANTUCKET,MA 02554		501(C)(3)	2012 DONATION	2,000
NATIONAL STUTTERING ASSOC 119 W 40TH STREET 14TH FLOOR NEWYORK,NY 10018		501(C)(3)	2012 DONATION	5,000
NYU SCHOOL OF MEDICINE ONE PARK AVENUE 6TH FLOOR NEWYORK,NY 10016		501(C)(3)	RESEARCH	223,297
PROVIDENCE TARZANA MEDICAL CTR 18321 CLARK STREET TARZANA,CA 91356		501(C)(3)	SPIRITUAL CARE DEPT	2,500
PROVIDENCE TARZANA MEDICAL CTR 18321 CLARK STREET TARZANA,CA 91356		501(C)(3)	SPIRITUAL CARE DEPT	1,000
REGENTS OF THE UNIV OF MINNESOTA 200 OAK STREET SE SUITE 450 MINNEAPOLIS,MN 55455		501(C)(3)	RESEARCH	311,615

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>				
REGENTS OF THE UNIV OF CA 5171 CALIFORNIA AVENUE SUITE 150 IRVINE,CA 92617		501(C)(3)	RESEARCH	212,240
ROSALIND FRANKLIN UNIV 3333 GREEN BAY ROAD NORTH CHICAGO,IL 60064		501(C)(3)	RESEARCH	177,133
ST JUDE'S CHILDREN'S RESEARCH HOSPITAL 12365 LEWIS STREET GARDEN GROVE,CA 92840		501(C)(3)	2012 DONATION	4,000
ST SEBASTIAN'S SCHOOL 1191 GREENDALE AVENUE NEEDHAM,MA 02492		501(C)(3)	2012 SENIOR GIFT	50,000
UC IRVINE HEALTH SCHOOL OF MEDICINE 101 ACADEMY WAY SUITE 120 IRVINE,CA 92617		501(C)(3)	DIABETES CENTER	5,000
VALPARAISO UNIV SCHOOL OF LAW 656 S GREENWICH STREET VALPARAISO,IN 46383		501(C)(3)	SUPPORT OF KEN AND SUE ANDERSON TEACHER SCHOLARSHIP	500
VALPARAISO UNIV SCHOOL OF LAW 656 S GREENWICH STREET VALPARAISO,IN 46383		501(C)(3)	SUPPORT OF KEN AND SUE ANDERSON TEACHER SCHOLARSHIP	1,000
BETTY FORD FOUNDATION 41990 COOK STREET PALM DESERT,CA 92211		501(C)(3)	BETTY FORD LEGACY FUND	10,000
USC VOLLEYBALL SCHOLARSHIPS ATHLETICS HERITAGE HALL LOS ANGELES,CA 90089		501(C)(3)	IACOCCA / ASSAD ENDOWED SCHOLARSHIP FUND	97,840
MARIAN HIGH SCHOOL 7225 LAHSER ROAD BLOOMFIELD HILLS,MI 48301		501(C)(3)	TRADITION AND VISION CAMPAIGN	10,000
PRESIDENT & FELLOWS OF MIDDLEBURY COLLEGE OLD CHAPEL 107 MIDDLEBURY,VT 05753		501(C)(3)	SCHOLARSHIP FUND	25,000
BOSTON BIOMEDICAL RESEARCH INSTITUTE 64 GROVE STREET WATERTOWN,MA 02472		501(C)(3)	RESEARCH	250,000
LEHIGH UNIVERSITY 111 RESEARCH DRIVE IACOCCA HALL BETHLEHEM,PA 18015		501(C)(3)	GLOBAL VILLAGE	20,985
MASSACHUSETTS GENERAL HOSPITAL 165 CAMBRIDGE STREET SUITE 600 BOSTON,MA 02114		501(C)(3)	RESEARCH	1,000,000
ST MARGARET'S EPISCOPAL SCHOOL 31641 LANOVIA AVENUE SAN JUAN CAPISTRANO,CA 92675		501(C)(3)	DINING CENTER	100,000
Total  3a				2,962,270

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>				
BETTY FORD CENTER41990 COOK STREET PALM DESERT,CA 92211		501(C)(3)	UNRESTRICTED	20,000
MASSACHUSETTS GENERAL HOSPITAL165 CAMBRIDGE STREET BOSTON,MA 02114		501(C)(3)	RESTRICTED - TYPE 1 DIABETES RESEARCH - DENISE FAUSTMAN	1,500,000
PRESIDENT & FELLOWS OF MIDDLEBURY COLLEGEOLD CHAPEL 107 MIDDLEBURY,VT 05753		501(C)(3)	RESTRICTED - INTERNSHIPS	25,000
ST MARGARET'S EPISCOPAL SCHOOL31641 LANOVIA AVENUE SAN JUAN CAPISTRANO,CA 92675		501(C)(3)	RESTRICTED - DINING CENTER	200,000
UNIVERSITY OF SOUTHERN CALIFORNIAHERITAGE HALL MC 0602 LOS ANGELES,CA 90089		501(C)(3)	RESTRICTED - 2 ATHLETIC SCHOLARSHIPS	200,000
Total  3b				1,945,000

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

2012

Name of the 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	<div><input type="checkbox"/> 501(c)() (enter number) organization</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust not treated as a private foundation</div> <div><input type="checkbox"/> 527 political organization</div>
Form 990-PF	<div><input checked="" type="checkbox"/> 501(c)(3) exempt private foundation</div> <div><input type="checkbox"/> 4947(a)(1) nonexempt charitable trust treated as a private foundation</div> <div><input type="checkbox"/> 501(c)(3) taxable private foundation</div>

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, total 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 total 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 Part I, 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 I if additional space is needed		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<u>1</u>	IACOCCA CLUT FBO ARIANNA ASSAD C/O COMERICA DETROIT, MI 48226	\$ 89,362	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>2</u>	IACOCCA CLUT FBO PARKER LEE HENTZ 201 WASHINGTON STREET BOSTON, MA 02108	\$ 100,226	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>3</u>	TEK CORPORATION 450 ROBBINS DRIVE TROY, MI 48083	\$ 5,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u>4</u>	NATIONAL PARTS DEPOT 900 SW 38TH AVENUE OCALA, FL 34474	\$ 10,000	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u> </u>	 	\$ <u> </u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
<u> </u>	 	\$ <u> </u>	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization IACocca Family Foundation	Employer identification number 38-6071154
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Part II	Noncash Property (see instructions) 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 that total 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
—	<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>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
—	<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>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee
—	<div></div>	<div></div>	<div></div>
	(e) Transfer of gift		
	Transferee's name, address, and ZIP 4		Relationship of transferor to transferee

TY 2012 Accounting Fees Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	5,325	533		4,792

**TY 2012 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	942,428	942,428

TY 2012 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	29,193,422	29,193,422
CASH HELD FOR INVESTMENTS	FMV	1,728,239	1,728,239
KINETA INVESTMENT LOAN	FMV	500,000	500,000

TY 2012 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	72,950	44,349	28,601	28,601

TY 2012 Legal Fees Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	114,037	11,404		102,633

TY 2012 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	1,883,146	1,940,725	1,940,725

TY 2012 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	8,611	861		7,750
TELEPHONE	8,445	845		7,600
POSTAGE, SHIPPING & DELIVERY	3,270	327		2,943
INSURANCE	40,490	4,049		36,441
OUTSIDE COMPUTER SERVICES	3,062	306		2,756
PAYROLL PROCESSING FEES	4,462	446		4,016
STORAGE	4,478	448		4,030
MISCELLANEOUS	6,957	696		6,261
BANK SERVICE CHARGES	56	6		50
MEMBERSHIP DUES	4,169	417		3,752
BAD DEBT	44,000	0		44,000

TY 2012 Other Income Schedule

Name: IACocca FAMILY FOUNDATION

EIN: 38-6071154

Description	Revenue And Expenses Per Books	Net Investment Income	Adjusted Net Income
MISCELLANEOUS	9,201	9,201	9,201

TY 2012 Other Increases Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Description	Amount
UNREALIZED GAIN	2,912,758

TY 2012 Other Professional Fees Schedule**Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER	17,000	1,700		15,300
INVESTMENT	136	136		0

TY 2012 Taxes Schedule**Name:** IACocca FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	27,795	2,779		25,016
EXCISE TAX	10,000	0		0