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Form **990-PF**

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0052

2013Department of the Treasury
Internal Revenue Service

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▶ Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

Open to Public Inspection

For calendar year 2013 or tax year beginning

, and ending

Name of foundation SECCHIA FAMILY FOUNDATION		A Employer identification number 38-2641093
Number and street (or P.O. box number if mail is not delivered to street address) 220 LYON SQUARE NW	Room/suite 510	B Telephone number (see instructions) 616-235-0010
City or town, state or province, country, and ZIP or foreign postal code GRAND RAPIDS MI 49503		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change		D 1. Foreign organizations, check here ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ☐
H Check type of organization ☐ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☒ Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here ☐
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ▶ \$ 15,023,482	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

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)
1	Contributions, gifts, grants, etc., received (attach schedule)	500,000			
2	Check ☐ if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	269,189	269,154	269,189	
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10 STMT 1	509,548			
b	Gross sales price for all assets on line 6a 4,675,790				
7	Capital gain net income (from Part IV, line 2)		9,244		
8	Net short-term capital gain			0	
9	Income modifications				
10a	Gross sales less returns and allowances				
b	Less: Cost of goods sold				
c	Gross profit or (loss) (attach schedule)				
11	Other income (attach schedule)				
12	Total. Add lines 1 through 11	1,278,727	278,398	269,189	
13	Compensation of officers, directors, trustees, etc.	0			
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule) SEE STMT 2	10,887	5,443		5,444
b	Accounting fees (attach schedule) STMT 3	3,394	1,697		1,697
c	Other professional fees (attach schedule) STMT 4	88,961	44,479		44,480
17	Interest				
18	Taxes (attach schedule) (see instructions) STMT 5	2,719	2,719		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (att. sch.) STMT 6	560	560		
24	Total operating and administrative expenses. Add lines 13 through 23	106,521	54,898	0	51,621
25	Contributions, gifts, grants paid	713,700			713,700
26	Total expenses and disbursements. Add lines 24 and 25	820,221	54,898	0	765,321
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	458,506			
b	Net investment income (if negative, enter -0-)		223,500		
c	Adjusted net income (if negative, enter -0-)			269,189	

For Paperwork Reduction Act Notice, see Instructions.

Form 990-PF (2013)

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	32,325	77,449	77,449
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7	Other notes and loans receivable (att schedule) ▶			
		Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments – U S and state government obligations (attach schedule) STMT 7	10,308,829	10,737,521	14,721,368
	b	Investments – corporate stock (attach schedule)			
	c	Investments – corporate bonds (attach schedule)			
	11	Investments – land, buildings, and equipment basis ▶			
Liabilities		Less: accumulated depreciation (attach sch) ▶			
	12	Investments – mortgage loans			
	13	Investments – other (attach schedule)			
	14	Land, buildings, and equipment basis ▶			
		Less: accumulated depreciation (attach sch) ▶			
	15	Other assets (describe ▶ SEE STATEMENT 8)	134,140	134,140	224,665
	16	Total assets (to be completed by all filers – see the instructions Also, see page 1, item I)	10,475,294	10,949,110	15,023,482
	17	Accounts payable and accrued expenses	190	500	
	18	Grants payable	295,000	310,000	
	19	Deferred revenue			
Net Assets or Fund Balances	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)	295,190	310,500	
		Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. ▶ ☐			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ▶ ☒			
	27	Capital stock, trust principal, or current funds			
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds	10,180,104	10,638,610	
	30	Total net assets or fund balances (see instructions)	10,180,104	10,638,610	
	31	Total liabilities and net assets/fund balances (see instructions)	10,475,294	10,949,110	

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	10,180,104
2	Enter amount from Part I, line 27a	2	458,506
3	Other increases not included in line 2 (itemize) ▶	3	
4	Add lines 1, 2, and 3	4	10,638,610
5	Decreases not included in line 2 (itemize) ▶	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	10,638,610

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs. MLC Co.)		(b) How acquired P – Purchase D – Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 9,244			9,244
b			
c			
d			
e			

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

(i) FMV 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			9,244
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7	2	9,244
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 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))
2012	727,495	13,152,917	0.055311
2011	615,489	12,973,322	0.047443
2010	571,677	12,332,171	0.046357
2009	580,397	10,870,191	0.053393
2008	658,180	12,214,258	0.053886

2 Total of line 1, column (d)	2	0.256390
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	0.051278
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5	4	13,937,331
5 Multiply line 4 by line 3	5	714,678
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	2,235
7 Add lines 5 and 6	7	716,913
8 Enter qualifying distributions from Part XII, line 4 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.	8	765,321

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 – see 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	2,235
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	2,235
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0
5	Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-	5	2,235
6	Credits/Payments:		
a	2013 estimated tax payments and 2012 overpayment credited to 2013	6a	
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	
8	Enter any penalty for underpayment of estimated tax. Check here ☒ if Form 2220 is attached	8	50
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	2,285
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	
11	Enter the amount of line 10 to be Credited to 2014 estimated tax ☐ Refunded ☐	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		X
1c Did the foundation file Form 1120-POL for this year?		X
2 Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. ☐ \$ _____ (2) On foundation managers ☐ \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
4b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		
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	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ☐ MI		
8b 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	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? If "Yes," complete Part XIV	X	
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

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		X
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		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► MARK A. SCHUT CPA 4575 LAKE MICHIGAN DR NW Located at ► GRAND RAPIDS MI ZIP+4 ► 49534	Telephone no. ► 616-735-3052		
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 2013, 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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ►	16	Yes	No
				X

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

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

		Yes	No
1a	During the year did the foundation (either directly or indirectly)		
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes	☒ No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes	☒ No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes	☒ No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes	☒ No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes	☒ No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes	☒ No
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	
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 2013?	N/A	
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 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013? If "Yes," list the years ► 20 , 20 , 20 , 20	☐ Yes	☒ No
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)	N/A	
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	N/A	
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes	☒ No
b	If "Yes," did it have excess business holdings in 2013 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 2013)	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?		X

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

5a	During the year did the foundation pay or incur any amount to:			
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes	☒ No	
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	☐ Yes	☒ No	
(3)	Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes	☒ No	
(4)	Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? (see 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 instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A ☐		5b
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? If "Yes," attach the statement required by Regulations section 53.4945–5(d)	N/A ☐ Yes ☐ No		
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? If "Yes" to 6b, file Form 8870			6b X
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes	☒ No	
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A		7b

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).**

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

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
NONE				

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
NONE		

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

**Part IX-A Summary of Direct Charitable Activities**

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

Expenses

1 SEE STATEMENT 9	
2 SEE STATEMENT 10	150,000
3 KENT COUNTY TRAFFIC SQUAD SAFETY & COMMUNITY FUND PLEDGES 2,3,4 OF 4	101,000
4 BOYS AND GIRLS CLUB OF GR YOUTH C PROVIDED FOR GALA FUNDRAISER, CAPITAL CAMPAIGN PLEDGE 3 OF 3 AND RITZ ON THE RANCH PLEDGE 2 OF 5	75,000
	56,300

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 N/A	
2	
All other program-related investments See instructions	
3	

Total. Add lines 1 through 3



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	13,820,151
b	Average of monthly cash balances	1b	129,574
c	Fair market value of all other assets (see instructions)	1c	199,850
d	Total (add lines 1a, b, and c)	1d	14,149,575
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	14,149,575
4	Cash deemed held for charitable activities. Enter 1½% of line 3 (for greater amount, see instructions)	4	212,244
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	13,937,331
6	Minimum investment return. Enter 5% of line 5	6	696,867

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	
2a	Tax on investment income for 2013 from Part VI, line 5	2a	
b	Income tax for 2013 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	

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	765,321
b	Program-related investments – total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	765,321
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	2,235
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	763,086

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 2012	(c) 2012	(d) 2013
1 Distributable amount for 2013 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only				
b Total for prior years: 20____, 20____, 20____				
3 Excess distributions carryover, if any, to 2013.				
a From 2008				
b From 2009				
c From 2010				
d From 2011				
e From 2012				
f Total of lines 3a through e				
4 Qualifying distributions for 2013 from Part XII, line 4: ► \$ <u>765,321</u>				
a Applied to 2012, but not more than line 2a				
b Applied to undistributed income of prior years (Election required – see instructions)				
c Treated as distributions out of corpus (Election required – see instructions)				
d Applied to 2013 distributable amount				
e Remaining amount distributed out of corpus	765,321			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	765,321			
b Prior years' undistributed income. Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b. Taxable amount – see instructions				
e Undistributed income for 2012. Subtract line 4a from line 2a. Taxable amount – see instructions				
f Undistributed income for 2013. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2014				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9:				
a Excess from 2009				
b Excess from 2010				
c Excess from 2011				
d Excess from 2012				
e Excess from 2013				

Part XIV Private 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 2013, enter the date of the ruling N/A

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

	Tax year	Prior 3 years			(e) Total
	(a) 2013	(b) 2012	(c) 2011	(d) 2010	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed N/A					
b 85% of line 2a N/A					
c Qualifying distributions from Part XII, line 4 for each year listed	765,321	730,079	615,489	571,677	2,682,566
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	765,321	730,079	615,489	571,677	2,682,566
3 Complete 3a, b, or c for the alternative test relied upon.					
a "Assets" alternative test – enter:					
(1) Value of all assets N/A					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i) N/A					
b "Endowment" alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed	464,578	438,431	432,444	411,073	1,746,526
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) N/A					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) N/A					
(3) Largest amount of support from an exempt organization N/A					
(4) Gross investment income N/A					

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

1 Information Regarding Foundation Managers:

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

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

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

Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see 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 address of the person to whom applications should be addressed:
N/A

b The form in which applications should be submitted and information and materials they should include.
N/A

c Any submission deadlines:
N/A

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

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	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 STATEMENT 11				713,700
Total			▶ 3a	713,700
b Approved for future payment N/A				
Total			▶ 3b	

Schedule B
(Form 990, 990-EZ,
or 990-PF)Department of the Treasury
Internal Revenue Service**Schedule of Contributors**

OMB No 1545-0047

2013

▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.

▶ Information about Schedule B (Form 990, 990-EZ, 990-PF) and its instructions is at www.irs.gov/form990.

Name of the organization

Employer identification number

SECCHIA FAMILY FOUNDATION

38-2641093

Organization type (check one).

Filers of:**Section:**

Form 990 or 990-EZ

☐ 501(c)() (enter number) organization☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation☒ 501(c)(3) taxable private foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

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

Special Rules

- ☐
- For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33
- ¹
- /
- ₃
- % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.

- ☐
- For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, 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 its Form 990-PF, Part I, line 2, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization SECCHIA FAMILY FOUNDATION	Employer identification number 38-2641093
--	---

Part I **Contributors** (see instructions). 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
1	SIBSCO, LLC 220 LYON NW SUITE 510 GRAND RAPIDS MI 49503	\$ 500,000	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Federal Statements

FYE: 12/31/2013

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

Description			How Received	Whom Sold	Date Acquire
Date Sold	Sale Price	Cost	Expense	Depreciation	Net Gain / Loss
SEE ATTACHED LEGACY TRUST	4700		PURCHASE		VARIOUS
VARIOUS	\$ 1,166,916	\$ 1,116,315	\$	\$	50,601
SEE ATTACHED LEGACY TRUST	4700		PURCHASE		VARIOUS
VARIOUS	560,071	437,189			122,882
SEE ATTACHED LEGACY TRUST	4700		PURCHASE		VARIOUS
VARIOUS	1,951,979	1,712,391			239,588
SEE ATTACHED FIDELITY			PURCHASE		VARIOUS
VARIOUS	914,480	818,007			96,473
SEE ATTACHED FIDELITY			PURCHASE		VARIOUS
VARIOUS	73,100	82,350			-9,250
TOTAL	\$ 4,666,546	\$ 4,166,252	\$ 0	\$ 0	\$ 500,294

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

Description		Total	Net Investment	Adjusted Net	Charitable Purpose
MIKA MEYERS BECKETT & JONES		\$ 10,887	\$ 5,443	\$	\$ 5,444
TOTAL		\$ 10,887	\$ 5,443	\$ 0	\$ 5,444

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

Description		Total	Net Investment	Adjusted Net	Charitable Purpose
HENDON & SLATE, P.C.		\$ 3,394	\$ 1,697	\$	\$ 1,697
TOTAL		\$ 3,394	\$ 1,697	\$ 0	\$ 1,697

Federal Statements

FYE: 12/31/2013

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

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
NORRIS PERNE & FRENCH	\$ 29,931	\$ 14,964	\$	\$ 14,965
LEGACY TRUST BANK	59,030	29,515		29,515
TOTAL	<u>\$ 88,961</u>	<u>\$ 44,479</u>	<u>\$ 0</u>	<u>\$ 44,480</u>

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

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
INCOME TAX	\$ 2,719	\$ 2,719	\$	\$
TOTAL	<u>\$ 2,719</u>	<u>\$ 2,719</u>	<u>\$ 0</u>	<u>\$ 0</u>

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

<u>Description</u>	<u>Total</u>	<u>Net Investment</u>	<u>Adjusted Net</u>	<u>Charitable Purpose</u>
EXPENSES	\$	\$	\$	\$
BANK CHARGES	540	540		
FEES	20	20		
MISCELLANEOUS				
TOTAL	<u>\$ 560</u>	<u>\$ 560</u>	<u>\$ 0</u>	<u>\$ 0</u>

Federal Statements

FYE: 12/31/2013

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

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Basis of Valuation</u>	<u>Fair Market Value</u>
UNIVERSAL FOREST PRODUCTS	\$ 563,603	\$ 563,603		\$ 1,645,017
NORRIS PERNE & FRENCH	4,149,079	4,345,013		5,706,350
LEGACY TRUST	5,596,147	5,828,905		7,370,001
TOTAL	<u>\$ 10,308,829</u>	<u>\$ 10,737,521</u>		<u>\$ 14,721,368</u>

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

<u>Description</u>	<u>Beginning of Year</u>	<u>End of Year</u>	<u>Fair Market Value</u>
LIFE INSURANCE	\$ 134,140	\$ 134,140	\$ 224,665
TOTAL	<u>\$ 134,140</u>	<u>\$ 134,140</u>	<u>\$ 224,665</u>

Statement 9 - Form 990-PF, Part IX-A, Line 1 - Summary of Direct Charitable Activities

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

Statement 10 - Form 990-PF, Part IX-A, Line 2 - Summary of Direct Charitable Activities

<u>Description</u>
MICHIGAN STATE UNIVERSITY PROVIDED FOR THE DAUGHTERS OF CHARITY TECHNOLOGY AND RESEARCH FOR INTELL DISABILITY AND THE ATHLETIC COACHES RECRUITING FUND

**Statement 11 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the
Year**

Name		Address	Address
Relationship	Status	Purpose	Amount
ACTON INSTITUTE		161 OTTAWA AVE NW	GRAND RAPIDS MI 49503
		ACTON 25 CAPITAL CAMPAIGN	5,000
AHRC NYC		83 MAIDEN LANE	NEW YORK NY 10038-4812
		CENTRAL PARK EARLY LEARNING CTR	4,500
AQUINAS COLLEGE		1607 ROBINSON RD SE	GRAND RAPIDS MI 49506
		REFLECTION AWARD SPONSOR	6,500

Federal Statements

FYE: 12/31/2013

Statement 11 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name		Address	Address
Relationship	Status	Purpose	Amount
ARTPRIZE		41 SHELDON BLVD SE	GRAND RAPIDS MI 49503
		MAP SPONSORSHIP	6,000
ASSOC FOR THE BLIND		456 CHERRY ST SE	GRAND RAPIDS MI 49503
		100TH ANNIV GALA	1,000
BAXTER COMMUNITY CENTER		935 BAXTER SE	GRAND RAPIDS MI 49506
		BRIDGE BUILDER	4,000
BOYS & GIRLS CLUB OF GR YOUTH		235 STRAIGHT AVE	GRAND RAPIDS MI 49504
		RITZ ON THE RANCH CAPITAL CAMPAIGN	56,300
BOYS & GIRLS TOWN OF ROME		250 EAST 63RD ST	NEW YORK NY 10065
		2013 GIFT	1,000
BROADWAY GRAND RAPIDS		122 LYON ST NW	GRAND RAPIDS MI 49503
		SCHOLARSHIPS	10,000
CAMP BLODGETT		1545 BUCHANAN AVE SW	GRAND RAPIDS MI 49507
		UN-GALA	100
CASCADE COMMUNITY FOUNDATION		6757 CASCADE RD SE	GRAND RAPIDS MI 49546
		2013 IRON CHEF	500
CENTRAL MICHIGAN UNIVERSITY		1200 S FRANKLIN ST	MT PLEASANT MI 48858
		JOHN ENGLER CNTR CHARTER SCHOOLS	10,000
CEO'S FOR CITIES		177 N STATE ST	CHICAGO IL 60601
		2013 GIFT	5,000
CHILDREN'S TRUST FUND		P.O. BOX 30037	LANSING MI 48909
		PAM POSTHUMUS AUCTION EVENT	1,000
CHILDREN'S ASSESMENT SUMMER		901 MICHIGAN NE	GRAND RAPIDS MI 49503
		2013 GIFT	800
CLOSE UP FOUNDATION		2930 KNAPP NE	GRAND RAPIDS MI 49525
		CLOSE UP WASHINGTON PROGRAM	1,000
COMMUNITY MEDIA CENTER		711 BRIDGE ST NW	GRAND RAPIDS MI 49504
		MOSAIC FILM EXPERIENCE	1,000
CONDUCTIVE LEARNING CENTER		2428 BURTON ST SE	GRAND RAPIDS MI 49546
		2013 GIFT	5,000
COUNCIL OF MICHIGAN FOUNDATIONS		ONE SOUTH HARBOR AVE	GRAND HAVEN MI 49417
		MEMBERSHIPS 2013	3,500
DAVENPORT UNIVERSITY FOUNDATION		415 EAST FULTON	GRAND RAPIDS MI 49503
		EXCELLENCE IN BUSINESS	5,000
DIOCESE OF GRAND RAPIDS		360 DIVISION AVENUE S	GRAND RAPIDS MI 49503
		BISHOPS ANGELS	1,000
DOWNS SYNDROME ASSOC OF WM		233 FULTON ST. E	GRAND RAPIDS MI 49503
		2013 GIFT	1,000
EAST GRAND RAPIDS HIGH SHOOOL		2211 LAKE DR SE	GRAND RAPIDS MI 49506
		JIMMY GERKEN FUND, BASEBALL PROJECT	2,000
F MEIJER GARDENS		1000 EAST BELTLINE NE	GRAND RAPIDS MI 49525
		DEVOS JAPANESE GARDEN, SECCHIA GARDE	11,000
FOUNDATION FOR MI FREEDOM		P.O. BOX 14162	LANSING MI 48901
		2013 GIFT	35,000
FRESH AIR FUND		633 THIRD AVE.	NEW YORK NY 10017
		SRS SUB-F YE GIFT	2,500
GAINNEY FOUNDATION		1593 GALBRAITH AVE SE	GRAND RAPIDS MI 49546
		TWO MOOSE CAMP	1,000
GERALD R FORD FOUNDATION		303 PEARL STREET NW	GRAND RAPIDS MI 49504
		USS GERALD FORD CHRISTENING, VAR	18,000
GRCC		143 BOSTWICK AVE NE	GRAND RAPIDS MI 49503
		CULINARY INS, WILL CT AND VIDEO UPGR	25,500

Federal Statements

FYE: 12/31/2013

Statement 11 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name	Address	Address
Relationship	Status	Purpose
Amount		
GRAND RAPIDS COMMUNITY LEGENDS	220 LYON NW	GRAND RAPIDS MI 49503
	2013 GIFT	150,000
GR SISTER CITIES INTERNATIONAL	443 CARPENTER NW	GRAND RAPIDS MI 49504
	2013 GIFT	1,000
GRAND HAVEN AREA COMM FNDN	1 SOUTH HARBOR	GRAND HAVEN MI 49417
	KITCHEN-LINDQUIST DUNE PRESERVE	1,000
GRAND RAPIDS FOUNDATION	1 MONROE CTR NW	GRAND RAPIDS MI 49503
	GRPD AWARDS PROGRAM	250
GVSU	1 N CAMPUS DR	ALLENDAL MI 49401
	PFS SPEAKERS SERIES 2012	12,500
GR JAZZ FEST	2526 SUMMIT RIDGE DR NE	GRAND RAPIDS MI 49505
	GRAND JAZZ FEST 2012	1,000
GREATER LANSING FOOD BANK	2116 MINT RD	LANSING MI 48906
	2013 GIFT	1,000
GUIDING LIGHT MISSION	255 S. DIVISION AVE	GRAND RAPIDS MI 49503
	2013 GIFT	1,000
HEART OF WM UNITED WAY	118 COMMERCE AVE SW	GRAND RAPIDS MI 49503
	2013 CAMPAIGN	15,000
HELEN DEVOS CHILDREN'S HOSPITAL	FDN 100 MICHIGAN ST NE, MC-4	GRAND RAPIDS MI 49501
	MWS SUBFOUNDATION	5,500
JAMIE HALE MEMORIAL TRUST	2542 HAMPSHIRE BLVD SE	GRAND RAPIDS MI 49506
	MEMORIAL FOUNDATION	100
JUNIOR DIABETES RESEARCH FNDN	5075 CASCADE RD SE	GRAND RAPIDS MI 49546
	2013 RIDE TO THE CURE	1,000
JUVENILE DIABETES RESEARCH FND	5075 CASCADE RD SE	GRAND RAPIDS MI 49546
	2013 WALK TO THE CURE	1,000
KENT COUNTY TRAFFIC SQUAD SAFETY	701 BALL AVE NE	GRAND RAPIDS MI 49503
	PLEDGE 2,3,4 OF 4	75,000
KENTWOOD PARKS & REC	4900 BRETON SE	KENTWOOD MI 49512
	FALLSBURG PARK PROJECT	26,000
KENT ISD	2930 KNAPP NE	GRAND RAPIDS MI 49525
	SPELLING BEE SPONSOR	1,000
KIDS FOOD BASKET	2055 OAK INDUSTRIAL DR NE	GRAND RAPIDS MI 49505
	2013 FAMILY GALA	1,000
LINC COMMUNITY REVITALIZATION	1167 MADISON AVENUE	GRAND RAPIDS MI 49507
	COMMUNITY SPIRIT AWARDS	500
LOCAL FIRST	949 WEALTHY ST SE	GRAND RAPIDS MI 49506
	2013 GIFT	1,000
MAKE A WISH FOUNDATION	648 MONROE N	GRAND RAPIDS MI 49503
	2013 WISH BALL EVENT, WISHING WELL	2,000
MARINE CORP LEAGUE	1960 RANDALL NW	GRAND RAPIDS MI 49534
	2013 CONVENTION SPONSOR	1,000
MAYFLOWER CONGREGATIONAL CHURCH	2345 ROBINSON RD SE	GRAND RAPIDS MI 49506
	2013 GIFT	5,000
MSU	426 AUDITORIUM RD	EAST LANSING MI 48824
	COACHES RECRUITMENT, DAUGHTERS OF CH	101,000
MSU ALUMNI CLUB OF WM	1345 MONROE NW	GRAND RAPIDS MI 49505
	TAILGATER	2,500
NIAF	1860 - 19TH ST NW	WASHINGTON DC 20009
	VOYAGE OF DISCOVERY	5,000
NOORTHOEK ACADEMY	P.O. BOX 6241	GRAND RAPIDS MI 49516
	BIG STEP WALK 2013	1,000

Federal Statements

FYE: 12/31/2013

Statement 11 - Form 990-PF, Part XV, Line 3a - Grants and Contributions Paid During the Year (continued)

Name	Address	Address
Relationship	Status	Purpose
		Amount
NRTWLDF		8001 BRADDOCK RD
	2013 GIFT	SPRINGFIELD VA 22160
		1,000
OPERA GRAND RAPIDS		1320 FULTON ST SE
	2013 GIFT	GRAND RAPIDS MI 49503
		1,000
ORIENTAL INSTITUTE		1155 EAST 58TH ST
	CNS SUBFOUNDATION GIFT 2013	CHICAGO IL 60637
		2,500
SANTA CLAUS GIRLS		155 MICHIGAN ST NW
	2013 GIFT	GRAND RAPIDS MI 49503
		1,000
SCHOOLS FOR SIERRA LEONE		2121 CELEBRATION DR NE
	KABALA CHR SCHOOL	GRAND RAPIDS MI 49525
		1,000
SEATTLE GIRL'S SCHOOL		2706 S. JACKSON ST
	SSA SUBFOUNDATION GIFT	SEATTLE WA 98144
		3,000
SENIOR NEIGHBORS, INC		820 MONROE NW
	TWILIGHT SHINES EVENT	GRAND RAPIDS MI 49503
		5,000
SPECIAL OLYMPICS MICHIGAN		2901 WABASH RD
	2013 GIFT	VESTABURG MI 48891
		3,750
ST MARY'S FOUNDATION		200 JEFFERSON AVE SE
	UP ON THE ROOF EVENT	GRAND RAPIDS MI 49503
		3,500
STUDENT ADVANCEMENT FNDN		111 LIBRARY NE
	MINDSHARE, DR. TAYLOR GIFT	GRAND RAPIDS MI 49503
		18,300
VAN ANDEL INSTITUTE		333 BOSTWICK AV NE
	HOPE ON THE HILL, PARKINSONS RESEARC	GRAND RAPIDS MI 49503
		30,000
VET SPORTS		1 MONROE CENTER NW
	GRPD CHARITY SOFTBALL GAME SPONSOR	GRAND RAPIDS MI 49503
		1,000
WEST MICHIGAN AVIATION ACADEMY		5363 44TH ST SE
	GALA SPONSOR	GRAND RAPIDS MI 49512
		5,000
WIDOWED PERSONS SERVICE		4211 CLYDE PARK SW
	2013 GIFT	WYOMING MI 49509
		100
WOUNDED WARRIOR PROJECT		P.O. BOX 758541
	2013 GIFT	TOPEKA KS 66675-8541
		1,000
TOTAL		713,700

Federal Statements

FYE: 12/31/2013

Tax-Exempt Dividends from Securities

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business Code</u>	<u>Exclusion Code</u>	<u>Postal Code</u>	<u>InState Muni (\$ or %)</u>
SPAB INTEREST	\$ 27		14		
	8		14		
TOTAL	<u>\$ 35</u>				

Taxable Dividends from Securities

<u>Description</u>	<u>Amount</u>	<u>Unrelated Business Code</u>	<u>Exclusion Code</u>	<u>Postal Code</u>	<u>US Obs (\$ or %)</u>
FROM LAZARD K-1	\$ 269,154		14		
			14		
TOTAL	<u>\$ 269,154</u>				



2013 TAX REPORTING STATEMENT

THE SECCHIA FAMILY FOUNDATION
Customer Service 616-459-3421
Recipient ID No 38-2641093 Payer's Fed ID Number 04-3523567

FORM 1099-B*

2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO 1545-0715

Long-term transactions for which basis is reported to the IRS --report on Form 8949 with Box D checked and/or Schedule D, Part II
(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP								15 State Tax Withheld
Action	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld
ALLIANZ SE PFD, 018805200								
Redemption	06/17/13	08/18/11	1,000,000	25,000.00	25,450.00	-450.00		
CENOVUS ENERGY INC COM NPV ISIN #CA15135, CVE, 15135U109								
Sale	02/12/13	02/16/11	1,000,000	32,975.11	36,197.35	-3,222.24		
TEVA PHARMACEUTICAL INDUSTRIES ADR-EACH, TEVA, 881624209								
Sale	02/01/13	02/16/11	400,000	15,125.35	20,702.43	-5,577.08		
TOTALS				73,100.46	82,349.78			0.00
Box D Long-Term Realized Gain				0.00				
Box D Long-Term Realized Loss				-9,249.32				
Box D Wash Sale Loss Disallowed							0.00	

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





2013 TAX REPORTING STATEMENT

THE SECCHIA FAMILY FOUNDATION

Customer Service 616-459-3421
Recipient ID No 38-2641093 Payer's Fed ID Number 04-3523567

FORM 1099-B*

2013 Proceeds from Broker and Barter Exchange Transactions

Copy B for Recipient OMB NO 1545-0715

Long-term transactions for which basis is not reported to the IRS --report on Form 8949 with Box E checked and/or Schedule D, Part II

(This Label is a Substitute for Boxes 1c & 6)

(IRS Form 1099-B box numbers are shown below in bold type)

8 Description, 1d Stock or Other Symbol, CUSIP	1a Date of Sale or Exchange	1b Date of Acquisition	1e Quantity Sold	2a Sales Price of Stocks, Bonds, etc (a)	3 Cost or Other Basis (b)	Gain/Loss (-)	5 Wash Sale Loss Disallowed	4 Federal Income Tax Withheld	13 State Tax Withheld	15 State Tax Withheld
ADOBE SYS INC, ADBE, 00724F101										
Sale	06/13/13	04/19/05	2,760 000	118,656 44	78,629 60	40,026 84				
Sale	06/13/13	05/18/05	400 000	17,196 59	12,220 00	4,976 59				
Subtotals				135,853.03	90,849.60					
ALLIANZ SE PFD, 018805200										
Redemption	06/17/13	01/11/10	6,000 000	150,000 00	150,840 00	-840 00				
BARCLAYS BANK PLC MTN 2 5000% 01/23/201, 06739FGP0										
Redemption	01/23/13	06/09/10	150,000 000	150,000 00	147,771 00	2,229 00				
FEDERAL HOME LOAN BANKS 4 12500% 03/13/2, 3133XXP50										
Sale	02/22/13	05/11/10	100,000 000	117,491 00	100,578 65	16,912 35				
JPMORGAN CHASE & CO DEPOSITARY SHS REPST, 46625H621										
Redemption	09/03/13	08/15/08	6,000 000	150,000 00	150,435 00	-435 00				
PAYCHEX INC, PAYX, 704326107										
Sale	08/27/13	01/14/10	4,000 000	154,416 28	125,670 00	28,746 28				
TEVA PHARMACEUTICAL INDUSTRIES ADR-EACH, TEVA, 881624209										
Sale	02/01/13	10/06/05	1,500 000	56,720 05	51,863 00	4,857 05				
TOTALS				914,480.36	818,007.25				0.00	
				Box E Long-Term Realized Gain		97,748.11				
				Box E Long-Term Realized Loss		-1,275.00				
				Box E Wash Sale Loss Disallowed		96,473	0.00			

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2013 Tax Information Statement

Payer's Name and Address:

LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

Recipient's Name and Address:

SECCHIA FAMILY FOUNDATION
C/O M SCHUT - H & S COMPANIES
4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

State:

MI

Questions?

(616)454-2852

☐ Corrected

☐ 2nd TIN notice

2013 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums.
Covered (Box 6a is not checked)

Cusip Description (Box 8) Stock or Other Symbol (Box 1d)

Quantity Sold (Box 1e)	Date of Sale or Exchange (Box 1a)	Date of Acquisition (Box 1b)	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis (Box 3)	Wash Sale Loss Disallowed (Box 5)	Net Gain or Loss (Box 4)	Federal Income Tax Withheld (Box 15)	State Tax Withheld (Box 15)
Short Term Sales Reported on 1099-B								
G1151C101	ACCENTURE PLC CL A		ACN					
75.0000	01/31/2013	06/21/2012	5,422.38	4,295.24	0.00	1,127.14	0.00	0.00
005125109	ACXIOM CORP		ACXM					
20.0000	02/01/2013	09/12/2012	356.59	363.80	0.00	-7.21	0.00	0.00
008252108	AFFILIATED MANAGERS GROUP INC		AMG					
125.0000	01/31/2013	Various	17,988.35	13,890.00	0.00	4,098.35	0.00	0.00
012653101	ALBEMARLE CORP		ALB					
20.0000	02/01/2013	09/12/2012	1,233.28	1,111.80	0.00	121.48	0.00	0.00
018490102	ALLERGAN INC		AGN					
175.0000	01/31/2013	Various	18,423.71	15,071.48	0.00	3,352.23	0.00	0.00
018581108	ALLIANCE DATA SYSTEMS CORP		ADS					
20.0000	01/31/2013	09/12/2012	3,141.19	2,809.40	0.00	331.79	0.00	0.00
025816109	AMERICAN EXPRESS CO		AXP					
200.0000	01/31/2013	Various	11,835.83	11,223.28	0.00	612.55	0.00	0.00
037833100	APPLE INC		AAPL					
40.0000	10/29/2013	07/01/2013	20,948.03	16,239.20	0.00	4,708.83	0.00	0.00

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(Box 1e)	(Box 1a)	(Box 1b)	(Box 2a)	(Box 3)	(Box 5)	(Box 4)	(Box 4)	(Box 15)	
044209104	ASHLAND INC		ASH						
45.0000	02/01/2013	11/12/2012	3,559.79	3,254.65	0.00	305.14	0.00	0.00	
00080Y785	ASTON BARINGS INTL FUND-I		ABIIX						
15426.1680	06/24/2013	Various	106,594.82	105,000.00	0.00	1,594.82	0.00	0.00	
050095108	ATWOOD OCEANICS INC		ATW						
20.0000	02/01/2013	09/17/2012	1,074.20	962.80	0.00	111.40	0.00	0.00	
Y0486S104	AVAGO TECHNOLOGIES LTD		AVGO						
15.0000	01/31/2013	09/13/2012	537.59	520.65	0.00	16.94	0.00	0.00	
Y0486S104	AVAGO TECHNOLOGIES LTD		AVGO						
10.0000	10/29/2013	05/03/2013	460.58	321.10	0.00	139.48	0.00	0.00	
073302101	B/E AEROSPACE INC		BEAV						
25.0000	01/31/2013	09/11/2012	1,263.97	988.25	0.00	275.72	0.00	0.00	
06647F102	BANKRATE INC		RATE						
270.0000	01/31/2013	05/24/2012	3,357.45	4,919.48	0.00	-1,562.03	0.00	0.00	
071813109	BAXTER INTERNATIONAL INC		BAX						
150.0000	01/31/2013	11/21/2012	10,140.19	9,910.49	0.00	229.70	0.00	0.00	
077454106	BELDEN INC		BDC						
30.0000	01/31/2013	09/11/2012	1,449.62	1,151.10	0.00	298.52	0.00	0.00	

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38-2641093
90-0138321

Recipient's Tax ID Number:
Payer's Federal ID Number:
Payer's State ID Number:

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Covered (Box 6a is not checked)

Cusip		Description (Box 8)		Stock or Other Symbol (Box 1d)		Federal Income Tax Withheld		State Tax Withheld	
Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks, Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	(Box 4)	(Box 15)	
(Box 1e)	(Box 1a)	(Box 1b)	(Box 2a)	(Box 3)	(Box 5)				
097793103	BONANZA CREEK ENERGY INC		BCEI						
65.0000	10/23/2013	07/22/2013	3,281.41	2,633.96	0.00	647.45	0.00	0.00	0.00
127097103	CABOT OIL & GAS CORP		COG						
85.0000	01/31/2013	Various	4,508.29	3,225.71	0.00	1,282.58	0.00	0.00	0.00
144285103	CARPENTER TECHNOLOGY CORP		CRS						
35.0000	01/31/2013	09/11/2012	1,855.14	1,833.14	0.00	22.00	0.00	0.00	0.00
148887102	CATAMARAN CORPORATION		CTRX						
45.0000	02/01/2013	09/17/2012	2,391.38	2,152.49	0.00	238.89	0.00	0.00	0.00
148887102	CATAMARAN CORPORATION		CTRX						
85.0000	10/04/2013	08/05/2013	3,971.40	4,931.61	0.00	-960.21	0.00	0.00	0.00
167250109	CHICAGO BRIDGE & IRON CO		CBI						
25.0000	02/01/2013	09/12/2012	1,283.19	1,004.00	0.00	279.19	0.00	0.00	0.00
184496107	CLEAN HBRS INC		CLH						
60.0000	02/08/2013	01/24/2013	3,189.52	3,382.45	0.00	-192.93	0.00	0.00	0.00
191216100	COCA COLA CO		KO						
175.0000	01/31/2013	02/09/2012	6,499.37	5,948.21	0.00	551.16	0.00	0.00	0.00
194014106	COLFAX CORP		CFX						
170.0000	01/04/2013	Various	6,972.97	5,979.04	0.00	993.93	0.00	0.00	0.00

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206708109	CONCUR TECHNOLOGIES INC	CNQR	5.0000	02/04/2013	09/11/2012	333.09	371.35	0.00	-38.26	0.00	0.00
20825C104	CONOCOPHILLIPS	COP	250.0000	01/31/2013	08/06/2012	14,527.19	14,014.87	0.00	512.32	0.00	0.00
268648102	E M C CORP MASS	EMC	400.0000	01/31/2013	Various	9,915.81	9,788.72	0.00	127.09	0.00	0.00
278642103	EBAY INC COM	EBAY	325.0000	01/31/2013	03/05/2012	18,089.13	11,644.03	0.00	6,445.10	0.00	0.00
278865100	ECOLAB INC COM	ECL	100.0000	01/31/2013	Various	7,256.84	6,318.98	0.00	937.86	0.00	0.00
30219G108	EXPRESS SCRIPTS HLDG	ESRX	200.0000	01/31/2013	08/06/2012	10,725.77	11,259.30	0.00	-533.53	0.00	0.00
31428X106	FEDEX CORP	FDX	175.0000	01/31/2013	Various	17,683.35	15,873.48	0.00	1,809.87	0.00	0.00
31787A507	FINISAR CORPORATION	FNSR	50.0000	01/04/2013	03/01/2012	823.74	1,058.22	0.00	-234.48	0.00	0.00
31787A507	FINISAR CORPORATION	FNSP	-100.0000	01/31/2013	03/01/2012	1,548.96	2,116.45	0.00	-567.49	0.00	0.00

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(Box 1e)	(Box 1a)	(Box 1b)				(Box 2a)	(Box 3)	(Box 5)		(Box 4)	(Box 15)
34354P105	FLOWERVE CORP	FLS	5 0000	01/31/2013	09/11/2012	785.08	660.25	0.00	124.83	0.00	0.00
302491303	FMC CORP	FMC	5 0000	01/31/2013	09/11/2012	307.81	285.00	0.00	22.81	0.00	0.00
345370860	FORD MOTOR CO DEL	F	1575.0000	01/31/2013	11/21/2012	20,143.95	17,325.00	0.00	2,818.95	0.00	0.00
345370860	FORD MOTOR CO DEL	F	450.0000	10/29/2013	11/21/2012	7,834.41	4,950.00	0.00	2,884.41	0.00	0.00
371901109	GENTEX CORP	GNTX	260.0000	01/25/2013	Various	4,975.60	7,124.86	0.00	-2,149.26	0.00	0.00
371901109	GENTEX CORP	GNTX	40.0000	02/01/2013	03/05/2012	776.12	975.24	0.00	-199.12	0.00	0.00
G4412G101	HERBALIFE LTD	HLF	70.0000	01/31/2013	08/13/2012	2,628.75	3,652.15	0.00	-1,023.40	0.00	0.00
436440101	HOLOGIC INC	HOLX	1600.0000	09/04/2013	07/01/2013	33,887.56	31,103.84	0.00	2,783.72	0.00	0.00
436440101	HOLOGIC INC	HOLX	125.0000	10/29/2013	07/01/2013	2,786.21	2,429.99	0.00	356.22	0.00	0.00

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Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks, Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld				
(Box 1e)	(Box 1a)	(Box 1b)	(Box 2a)	(Box 3)	(Box 5)		(Box 4)	(Box 15)				
436440101	HOLOGIC INC		HOLX									
975 0000	11/26/2013	07/01/2013	21,917.71	18,953.90	0.00	2,963.81	0.00	0.00				
459200101	IBM CORPORATION		IBM									
25 0000	01/31/2013	02/09/2012	5,094.64	4,834.25	0.00	260.38	0.00	0.00				
45103T107	ICON PLC SPONSORED ADR		ICLR									
50.0000	01/31/2013	09/12/2012	1,463.00	1,217.50	0.00	245.50	0.00	0.00				
451734107	IHS INC-CLASS A		IHS									
35.0000	02/01/2013	01/09/2013	3,622.22	3,573.02	0.00	49.20	0.00	0.00				
451734107	IHS INC-CLASS A		IHS									
40.0000	07/01/2013	01/09/2013	4,183.41	4,083.45	0.00	99.96	0.00	0.00				
45666Q102	INFORMATICA CORP		INFA									
75 0000	01/31/2013	Various	2,764.41	2,776.76	0.00	-12.35	0.00	0.00				
478160104	JOHNSON & JOHNSON		JNJ									
175 0000	01/31/2013	11/21/2012	12,956.73	12,190.41	0.00	766.32	0.00	0.00				
485170302	KANSAS CITY SOUTHERN		KSU									
250.0000	01/31/2013	11/21/2012	23,374.63	18,955.78	0.00	4,418.85	0.00	0.00				
485170302	KANSAS CITY SOUTHERN		KSU									
125.0000	10/29/2013	11/21/2012	15,414.74	9,477.89	0.00	5,936.85	0.00	0.00				

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(Box 1e)	(Box 1a)	(Box 1b)				(Box 2a)	(Box 3)	(Box 5)		(Box 4)	(Box 15)
489170100	KENAMETAL INC.	KMT	30.0000	01/23/2013	09/13/2012	1,269.27	1,150.20	0.00	119.07	0.00	0.00
515098101	LANDSTAR SYSTEMS INC	LSTR	15.0000	02/04/2013	09/14/2012	854.68	740.70	0.00	113.98	0.00	0.00
53217R207	LIFE TIME FITNESS	LTM	45.0000	01/31/2013	09/11/2012	2,280.19	2,212.65	0.00	67.54	0.00	0.00
501889208	LKQ CORP	LKQ	65.0000	02/01/2013	09/13/2012	1,460.62	1,260.02	0.00	200.60	0.00	0.00
580037109	MCDERMOTT INTL INC F	MDR	20.0000	07/01/2013	09/13/2012	164.85	245.40	0.00	-80.55	0.00	0.00
580037109	MCDERMOTT INTL INC F	MDR	100.0000	07/02/2013	09/13/2012	825.73	1,227.00	0.00	-401.27	0.00	0.00
580037109	MCDERMOTT INTL INC F	MDR	100.0000	07/03/2013	09/13/2012	823.50	1,227.00	0.00	-403.50	0.00	0.00
594901100	MICROS SYSTEMS INC	MCRS	45.0000	02/01/2013	01/25/2013	2,074.00	2,125.02	0.00	-51.02	0.00	0.00
594901100	MICROS SYSTEMS INC	MCRS	10.0000	02/01/2013	09/11/2012	460.89	520.50	59.61	0.00	0.00	0.00

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596278101	MIDDLEBY CORP (Box 1a) (Box 1b)	MIDD	1,395.12	1,177.10	0.00	218.02	0.00	0.00
10.0000	01/23/2013 09/13/2012	NOV	11,027.90	9,885.74	0.00	1,142.18	0.00	0.00
637071101	NATIONAL-OILWELL INC	NCR	3,736.71	2,995.66	0.00	741.05	0.00	0.00
150.0000	01/31/2013 Various	NHILX	21,182.76	20,382.57	0.00	800.19	0.00	0.00
62886E108	NCR CORPORATION COM NEW	NEE	8,994.81	8,053.93	0.00	940.87	0.00	0.00
135.0000	01/31/2013 Various	NUAN	2,047.60	2,116.25	68.65	0.00	0.00	0.00
64128K868	NEUBERGER BERMAN HI IN B-INS	NUAN	2,604.09	3,516.19	0.00	-912.10	0.00	0.00
2222.7450	01/31/2013 06/21/2012	OKE	8,254.57	7,220.33	0.00	1,034.24	0.00	0.00
65339F101	NEXTERA ENERGY INC	OKE	14,187.70	10,323.88	0.00	3,863.82	0.00	0.00
125.0000	01/31/2013 Various							
67020Y100	NUANCE COMMUNICATIONS INC							
85.0000	01/31/2013 09/11/2012							
67020Y100	NUANCE COMMUNICATIONS INC							
140.0000	06/05/2013 Various							
682680103	ONEOK INC NEW							
175.0000	01/31/2013 Various							
682680103	ONEOK INC NEW							
250.0000	10/29/2013 07/01/2013							

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2013 Tax Information Statement

Payer's Name and Address:

LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

Recipient's Name and Address:

SECCHIA FAMILY FOUNDATION
C/O M SCHUT - H & S COMPANIES
4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

State:

MI

Questions?

(616)454-2852

☐ Corrected

☐ 2nd TIN notice

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums.
Covered (Box 6a is not checked)

Cusip		Description (Box 8)		Stock or Other Symbol (Box 1d)		Federal Income Tax Withheld		State Tax Withheld	
Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks, Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)	
(Box 1e)	(Box 1a)	(Box 1b)	(Box 2a)	(Box 3)	(Box 5)				
68389X105	ORACLE CORPORATION COM	ORCL							
425.0000	01/31/2013	Various	15,095.87	12,209.87	0.00	2,886.00	0.00	0.00	0.00
703395103	PATTERSON COS INC	PDCO							
20.0000	01/16/2013	09/14/2012	695.60	687.00	0.00	8.60	0.00	0.00	0.00
704326107	PAYCHEX INC	PAYX							
250.0000	01/31/2013	Various	8,134.86	7,999.92	0.00	134.93	0.00	0.00	0.00
H6169Q108	PENTAIR LTD	PNR							
110.0000	01/31/2013	Various	5,523.26	4,783.68	0.00	739.58	0.00	0.00	0.00
H6169Q108	PENTAIR LTD	PNR							
45.0000	03/26/2013	09/11/2012	2,324.98	1,936.35	0.00	388.63	0.00	0.00	0.00
718172109	PHILIP MORRIS INTERNATIONAL	PM							
100.0000	01/31/2013	08/06/2012	8,864.82	9,255.98	0.00	-391.16	0.00	0.00	0.00
73172K104	POLYCOM INC	PLCM							
35.0000	01/23/2013	09/19/2012	408.81	404.95	0.00	3.86	0.00	0.00	0.00
73179P106	POLYONE CORP	POL							
150.0000	02/01/2013	Various	3,289.60	2,237.97	0.00	1,051.63	0.00	0.00	0.00
73179V103	POLYPORE INTERNATIONAL INC	PPO							
60.0000	01/31/2013	07/02/2012	2,327.80	2,348.95	0.00	-21.15	0.00	0.00	0.00

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 LEGACY TRUST
 300 OTTAWA NW, SUITE 600
 GRAND RAPIDS, MI 49503

Recipient's Tax ID Number:
 Payer's Federal ID Number:
 Payer's State ID Number:
 State:
 Questions?

Recipient's Name and Address:
 SECCHIA FAMILY FOUNDATION
 C/O M SCHUT - H & S COMPANIES
 4575 LAKE MICHIGAN DRIVE NW
 GRAND RAPIDS, MI 49534

MI
 (616)454-2852

☐ Corrected ☐ 2nd TIN notice

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 Covered (Box 6a is not checked)

Cusip	Description (Box 8)	Stock or Other Symbol (Box 1d)	Stocks Bonds, etc (Box 2a)	Cost or Other Basis (Box 3)	Wash Sale Loss Disallowed (Box 5)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
747525103	QUALCOMM INC COM	QCOM	11,633.83	9,795.66	0.00	1,838.17	0.00	0.00
74762E102	QUANTA SVCS INC	PWR	1,600.46	1,427.16	0.00	173.30	0.00	0.00
776696106	ROPER INDS INC NEW	ROP	11,708.76	9,941.04	0.00	1,767.71	0.00	0.00
779376102	ROVI CORP	ROVI	426.93	574.95	0.00	-148.02	0.00	0.00
795435106	SALIX PHARMACEUTICALS LTD	SLXP	239.74	212.90	0.00	26.84	0.00	0.00
80007P307	SANDRIDGE ENERGY INC	SD	1,338.07	1,812.50	0.00	-474.43	0.00	0.00
78388J106	SBA COMMUNICATIONS CORP	SBAC	1,429.10	1,197.60	0.00	231.50	0.00	0.00
817565104	SERVICE CORP INTERNATIONAL	SCI	973.26	885.95	0.00	87.31	0.00	0.00
831865209	SMITH A O CORPORATION	AOS	1,737.63	1,553.96	0.00	183.67	0.00	0.00

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Cusip		Description (Box 8)		Stock or Other Symbol (Box 1d)		Federal Income Tax Withheld		State Tax Withheld	
Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks, Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	(Box 4)	(Box 15)	
(Box 1e)	(Box 1a)	(Box 1b)	(Box 2a)	(Box 3)	(Box 5)				
845467109	SOUTHWESTERN ENERGY COMPANY COM		SWN						
20 0000	02/01/2013	09/14/2012	689.18	707.80	0.00	-18.62	0.00	0.00	0.00
858912108	STERICYCLE INC COM		SRCL						
5.0000	02/01/2013	09/11/2012	473.93	464.65	0.00	9.28	0.00	0.00	0.00
880770102	TERADYNE INC		TER						
50 0000	01/31/2013	09/11/2012	810.48	802.00	0.00	8.48	0.00	0.00	0.00
882681109	TEXAS ROADHOUSE INC CL A		TXRH						
45 0000	01/31/2013	09/11/2012	785.55	797.85	0.00	-12.30	0.00	0.00	0.00
885215566	THORNBURG INTL VALUE FD I		TGVIX						
3194 2940	01/30/2013	Various	93,976.13	86,120.68	0.00	7,855.45	0.00	0.00	0.00
885215566	THORNBURG INTL VALUE FD I		TGVIX						
706 2970	01/31/2013	11/21/2012	20,758.07	18,879.32	0.00	1,878.75	0.00	0.00	0.00
872540109	TJX COMPANIES		TJX						
250.0000	01/31/2013	Various	11,324.75	9,762.48	0.00	1,562.27	0.00	0.00	0.00
892356106	TRACTOR SUPPLY CO		TSCO						
15.0000	01/23/2013	09/11/2012	1,380.41	1,494.15	0.00	-113.74	0.00	0.00	0.00
892356106	TRACTOR SUPPLY CO		TSCO						
125 0000	01/31/2013	Various	12,789.72	11,140.96	0.00	1,648.76	0.00	0.00	0.00

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GRAND RAPIDS, MI 49503

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State:
Questions?

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4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

MI
(616)454-2852

☐ Corrected ☐ 2nd TIN notice

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Covered (Box 6a is not checked)

Cusip	Description (Box 8)	Stock or Other Symbol (Box 1d)	Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks, Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
(Box 1e)	(Box 1a)	(Box 2a)	(Box 1b)	(Box 3)	(Box 5)	(Box 4)	(Box 15)				
896239100	TRIMBLE NAV LTD	TRMB	65.0000	02/01/2013	11/12/2012	4,107.07	3,426.85	0.00	680.22	0.00	0.00
90384S303	ULTA SALON COSMETICS & FRAG INC	ULTA	20.0000	01/31/2013	01/24/2013	1,966.55	1,975.18	0.00	-8.63	0.00	0.00
90385D107	ULTIMATE SOFTWARE GROUP INC	ULTI	25.0000	01/24/2013	Various	2,392.94	2,328.96	0.00	63.98	0.00	0.00
90385D107	ULTIMATE SOFTWARE GROUP INC	ULTI	35.0000	01/31/2013	11/16/2012	3,557.59	3,055.84	0.00	501.75	0.00	0.00
904311107	UNDER ARMOUR INC-CLASS A	UA	100.0000	01/31/2013	Various	5,067.89	4,790.14	0.00	277.75	0.00	0.00
911163103	UNITED NAT FOODS INC	UNFI	25.0000	01/31/2013	09/11/2012	1,340.35	1,381.75	0.00	-41.40	0.00	0.00
911363109	UNITED RENTALS INC	URI	45.0000	01/31/2013	09/24/2012	2,262.77	1,639.62	0.00	623.15	0.00	0.00
917047102	URBAN OUTFITTERS INC	URBN	105.0000	01/31/2013	Various	4,510.33	3,863.25	0.00	647.08	0.00	0.00
902973304	US BANCORP	USB	325.0000	01/31/2013	11/21/2012	10,783.43	10,406.40	0.00	377.03	0.00	0.00

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Questions?

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Covered (Box 6a is not checked)

Cusip	Description (Box 8)	Stock or Other Symbol (Box 1d)	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis (Box 3)	Wash Sale Loss Disallowed (Box 5)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
91913Y100	VALERO ENERGY CORPORATION	VLO	34,927.62	18,179.12	0.00	16,748.50	0.00	0.00
800.0000	01/31/2013 05/07/2012							
91913Y100	VALERO ENERGY CORPORATION	VLO	4,984.91	4,616.13	0.00	368.78	0.00	0.00
125.0000	10/29/2013 09/04/2013							
92046N102	VALUECLICK INC	VCLK	3,517.83	4,718.81	0.00	1,200.98	0.00	0.00
180.0000	11/01/2013 Various							
92343V104	VERIZON COMMUNICATIONS	VZ	7,656.10	7,617.64	0.00	38.46	0.00	0.00
175.0000	01/31/2013 06/21/2012							
92828T889	VIRTUS EMERGING MKTS OPPOR-I	HIEMX	273,401.24	320,000.00	0.00	-46,598.76	0.00	0.00
30581.7940	08/29/2013 Various							
92826C839	VISA INC-CLASS A	V	11,820.49	9,876.75	0.00	1,943.74	0.00	0.00
75.0000	01/31/2013 08/06/2012							
928645100	VOLCANO CORP	VOLC	875.00	964.95	0.00	-89.95	0.00	0.00
35.0000	01/31/2013 09/11/2012							
955306105	WEST PHARMACEUTICAL SVCS INC	WST	1,796.14	1,646.84	0.00	149.30	0.00	0.00
30.0000	02/01/2013 01/16/2013							
Total Short Term Sales Reported on 1099-B			1,166,915.94	1,116,442.67	128.26	50,601.51	0.00	0.00

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2013 Tax Information Statement

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

Recipient's Tax ID Number:
[REDACTED]
Payer's Federal ID Number:
38-2641093
Payer's State ID Number:
90-0138321
State:
MI
Questions?
(616)454-2852

Recipient's Name and Address:
SECCHIA FAMILY FOUNDATION
C/O M SCHUT - H & S COMPANIES
4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

☐ Corrected ☐ 2nd TIN notice

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Covered (Box 6a is not checked)

Cusip		Description (Box 8)		Stock or Other Symbol (Box 1d)						
Quantity Sold (Box 1e)	Date of Sale or Exchange (Box 1a)	Date of Acquisition (Box 1b)	Stocks, Bonds, etc. (Box 2a)	Cost or Other Basis (Box 3)	Wash Sale Loss Disallowed (Box 5)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)		
Report on Form 8949, Part I, with Box A checked										
Long Term Sales Reported on 1099-B										
G1151C101	ACCENTURE PLC CL A									
125.0000	01/31/2013	Various	ACN	6,984.25	0.00	2,053.05	0.00	0.00		
00507K103	ACT									
30.0000	01/31/2013	11/21/2011	ACT	1,953.08	0.00	638.56	0.00	0.00		
00507K103	ACT									
45.0000	05/14/2013	Various	ACT	2,873.39	0.00	2,633.86	0.00	0.00		
00507K103	ACT									
80.0000	10/01/2013	01/27/2012	AMG	4,758.40	0.00	6,762.40	0.00	0.00		
008252108	AFFILIATED MANAGERS GROUP INC									
25.0000	07/01/2013	06/21/2012	AMG	2,582.49	0.00	1,493.68	0.00	0.00		
008252108	AFFILIATED MANAGERS GROUP INC									
60.0000	10/29/2013	10/27/2011	AMG	5,899.82	0.00	6,171.96	0.00	0.00		
018490102	ALLERGAN INC									
100.0000	09/04/2013	10/27/2011	AGN	8,389.75	0.00	509.49	0.00	0.00		

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2013 Tax Information Statement

Page 21 of 51

Payer's Name and Address:

LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

Recipient's Name and Address:

SECCHIA FAMILY FOUNDATION
C/O M SCHUT - H & S COMPANIES
4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

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

☐ Corrected

☐ 2nd TIN notice

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums.
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Cusip		Description (Box 8)		Stock or Other Symbol (Box 1d)		Stocks Bonds, etc. (Box 2a)		Cost or Other Basis (Box 3)		Wash Sale Loss Disallowed (Box 5)		Net Gain or Loss (Box 4)		Federal Income Tax Withheld (Box 15)		State Tax Withheld (Box 15)	
Quantity Sold	Date of Sale or Exchange	Date of Acquisition	(Box 1a)	(Box 1b)	(Box 1c)	(Box 2a)	(Box 2b)	(Box 3)	(Box 4)	(Box 5)	(Box 6)	(Box 7)	(Box 8)	(Box 9)	(Box 10)	(Box 11)	(Box 12)
025816109	50.0000	01/31/2013	07/18/2011	AMERICAN EXPRESS CO	AXP	2,958.96	2,532.67	0.00	0.00	0.00	0.00	426.29	0.00	0.00	0.00	0.00	0.00
025816109	150.0000	07/01/2013	07/18/2011	AMERICAN EXPRESS CO	AXP	11,445.81	7,598.01	0.00	0.00	0.00	0.00	3,847.80	0.00	0.00	0.00	0.00	0.00
071813109	650.0000	11/26/2013	11/21/2012	BAXTER INTERNATIONAL INC	BAX	43,985.38	42,945.43	0.00	0.00	0.00	0.00	1,039.95	0.00	0.00	0.00	0.00	0.00
09247X101	100.0000	01/31/2013	04/05/2011	BLACKROCK INC CLASS A	BLK	23,734.47	20,123.50	0.00	0.00	0.00	0.00	3,610.97	0.00	0.00	0.00	0.00	0.00
09247X101	50.0000	07/01/2013	02/09/2012	BLACKROCK INC CLASS A	BLK	12,924.28	9,474.50	0.00	0.00	0.00	0.00	3,449.78	0.00	0.00	0.00	0.00	0.00
09247X101	30.0000	10/29/2013	Various	BLACKROCK INC CLASS A	BLK	9,254.23	5,189.80	0.00	0.00	0.00	0.00	4,064.43	0.00	0.00	0.00	0.00	0.00
127097103	150.0000	11/08/2013	Various	CABOT OIL & GAS CORP	COG	4,992.08	2,653.68	0.00	0.00	0.00	0.00	2,338.40	0.00	0.00	0.00	0.00	0.00
148887102	15.0000	10/04/2013	09/17/2012	CATAMARAN CORPORATION	CTRX	700.83	717.50	0.00	0.00	0.00	0.00	-16.67	0.00	0.00	0.00	0.00	0.00
12572Q105	225.0000	01/31/2013	04/05/2011	CME GROUP INC.	CME	13,007.18	13,812.73	0.00	0.00	0.00	0.00	-805.55	0.00	0.00	0.00	0.00	0.00

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12572Q105	(Box 1a) (Box 1b) CME GROUP INC.							
225 0000	07/01/2013 Various		17,270.71	13,644.06	0.00	3,626.65	0.00	0.00
191216100	COCA COLA CO	KO						
75 0000	01/31/2013 04/05/2011		2,785.44	2,541.37	0.00	244.07	0.00	0.00
20441W203	COMPANHIA DE BEBIDAS-PR ADR	ABV						
200 0000	01/31/2013 Various		9,319.81	6,127.44	0.00	3,192.37	0.00	0.00
22160K105	COSTCO WHOLESALE CORP NEW	COST						
125 0000	01/31/2013 01/12/2012		12,838.46	10,031.35	0.00	2,807.11	0.00	0.00
12646R105	CST BRANDS INC	CST						
125 0000	05/29/2013 Various		4,059.19	2,077.17	0.00	1,982.02	0.00	0.00
235851102	DANAHER CORP	DHR						
325 0000	01/31/2013 05/25/2011		19,450.98	17,587.18	0.00	1,863.80	0.00	0.00
235851102	DANAHER CORP	DHR						
75 0000	10/29/2013 Various		5,417.15	4,024.61	0.00	1,392.54	0.00	0.00
268648102	EMC CORP MASS	EMC						
525 0000	07/01/2013 Various		12,468.84	11,914.43	0.00	554.41	0.00	0.00
278865100	ECOLAB INC COM	ECL						
25 0000	01/31/2013 05/25/2011		1,814.21	1,330.10	0.00	484.11	0.00	0.00

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Payer's State ID Number:
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278865100	ECOLAB INC COM	ECL	140.0000	10/29/2013	05/25/2011	14,890.15	7,448.57	0.00	7,441.58	0.00	0.00
30219G108	EXPRESS SCRIPTS HLDG	ESRX	25.0000	10/29/2013	08/06/2012	1,552.97	1,407.41	0.00	145.56	0.00	0.00
30231G102	EXXONMOBIL CORP	XOM	50.0000	01/31/2013	12/28/2007	4,534.40	4,374.52	0.00	159.88	0.00	0.00
31428X106	FEDEX CORP	FDX	150.0000	09/04/2013	Various	16,127.72	12,872.88	0.00	3,254.84	0.00	0.00
31428X106	FEDEX CORP	FDX	75.0000	10/29/2013	10/27/2011	9,917.82	6,315.47	0.00	3,602.35	0.00	0.00
302491303	FMC CORP	FMC	40.0000	01/31/2013	10/18/2011	2,462.46	1,508.63	0.00	953.83	0.00	0.00
459200101	IBM CORPORATION	IBM	25.0000	01/31/2013	10/10/2011	5,094.64	4,606.75	0.00	487.88	0.00	0.00
538034109	LIVE NATION ENTERTAINMENT, INC.	LYV	215.0000	01/31/2013	Various	2,179.86	2,407.21	0.00	-227.35	0.00	0.00
538034109	LIVE NATION ENTERTAINMENT, INC.	LYV	290.0000	07/31/2013	03/03/2011	4,780.24	3,244.35	0.00	1,535.89	0.00	0.00

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2013 Tax Information Statement

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

Recipient's Tax ID Number:
 Payer's Federal ID Number:
 Payer's State ID Number:
 State:
 Questions?

Recipient's Name and Address:
 SECCHIA FAMILY FOUNDATION
 C/O M SCHUT - H & S COMPANIES
 4575 LAKE MICHIGAN DRIVE NW
 GRAND RAPIDS, MI 49534

MI
 (616)454-2852

☐ Corrected ☐ 2nd TIN notice

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums.
 Covered (Box 6a is not checked)

Cusip		Description (Box 8)		Stock or Other Symbol (Box 1d)					
Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld	
(Box 1e)	(Box 1a)	(Box 1b)	(Box 2a)	(Box 3)	(Box 5)		(Box 4)	(Box 15)	
55027E102	LUMINEX CORP DEL		LMNX						
105.0000	01/31/2013	Various	1,933.96	2,380.30	0.00	-446.34	0.00	0.00	
580037109	MCDERMOTT INTL INC F		MDR						
250.0000	01/31/2013	Various	3,054.93	5,128.06	0.00	-2,073.13	0.00	0.00	
580037109	MCDERMOTT INTL INC F		MDR						
80.0000	07/01/2013	07/08/2011	659.39	1,178.00	0.00	-518.61	0.00	0.00	
65339F101	NEXTERA ENERGY INC		NEE						
25.0000	01/31/2013	04/05/2011	1,798.96	1,402.75	0.00	396.21	0.00	0.00	
670346105	NUCOR CORP		NUE						
300.0000	01/31/2013	04/05/2011	13,868.72	14,174.94	0.00	-306.22	0.00	0.00	
682680103	ONEOK INC NEW		OKE						
75.0000	05/10/2013	02/09/2012	3,577.43	3,049.12	0.00	528.31	0.00	0.00	
68389X105	ORACLE CORPORATION COM		ORCL						
125.0000	01/31/2013	Various	4,439.96	3,831.94	0.00	608.02	0.00	0.00	
704326107	PAYCHEX INC		PAYX						
225.0000	10/29/2013	Various	9,693.84	6,542.77	0.00	3,141.07	0.00	0.00	
H6169Q108	PENTAIR LTD		PNR						
25.0000	03/26/2013	04/14/2011	1,291.66	943.38	0.00	348.28	0.00	0.00	

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 300 OTTAWA NW, SUITE 600
 GRAND RAPIDS, MI 49503

Recipient's Tax ID Number:
 38-2641093
Payer's Federal ID Number:
 90-0138321
Payer's State ID Number:
 MI
State:
 (616)454-2852

Recipient's Name and Address:
 SECCHIA FAMILY FOUNDATION
 C/O M SCHUT - H & S COMPANIES
 4575 LAKE MICHIGAN DRIVE NW
 GRAND RAPIDS, MI 49534

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☐ Corrected

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 Covered (Box 6a is not checked)

CUSIP		Description (Box 8)		Stock or Other Symbol (Box 1d)		Federal Income Tax Withheld (Box 15)	
Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks, Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	State Tax Withheld
(Box 1e)	(Box 1a)	(Box 1b)	(Box 2a)	(Box 3)	(Box 5)	(Box 4)	(Box 15)
H6169Q108	PENTAIR LTD		PNR				
45 0000	07/29/2013	04/14/2011	2,700.40	1,698.09	0.00	1,002.31	0.00
73179V103	POLYPORE INTERNATIONAL INC		PPO				
115 0000	01/29/2013	12/01/2011	4,384.71	5,641.27	0.00	-1,256.56	0.00
73179V103	POLYPORE INTERNATIONAL INC		PPO				
60 0000	12/20/2013	07/02/2012	2,218.30	2,348.95	0.00	-130.65	0.00
779376102	ROVI CORP		ROVI				
200 0000	11/12/2013	12/06/2011	3,415.42	5,409.94	0.00	-1,994.52	0.00
795435106	SALIX PHARMACEUTICALS LTD		SLXP				
70 0000	01/31/2013	Various	3,356.41	2,517.69	0.00	838.72	0.00
795435106	SALIX PHARMACEUTICALS LTD		SLXP				
125 0000	04/12/2013	06/16/2011	6,172.36	4,438.03	0.00	1,734.33	0.00
80007P307	SANDRIDGE ENERGY INC		SD				
425 0000	02/12/2013	Various	2,412.85	4,621.30	0.00	-2,208.45	0.00
80007P307	SANDRIDGE ENERGY INC		SD				
1055 0000	03/27/2013	Various	5,646.66	11,072.69	0.00	-5,426.03	0.00
803062108	SAPIENT CORP		SAPE				
60 0000	02/01/2013	08/05/2011	734.47	730.32	0.00	4.15	0.00

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C/O M SCHUT - H & S COMPANIES
4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

Recipient's Tax ID Number:

38-2641093

Payer's Federal ID Number:

90-0138321

Payer's State ID Number:

MI

Questions?

(616)454-2852

☐ Corrected

☐ 2nd TIN notice

Reported to the IRS is Sales Price of stocks, bonds etc., less commissions and option premiums.
Covered (Box 6a is not checked)

Cusip	Description (Box 8)	Stock or Other Symbol (Box 1d)	Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis (Box 3)	Wash Sale Loss Disallowed (Box 5)	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
78388J106	SBA COMMUNICATIONS CORP	SBAC	60.0000	01/23/2013	04/04/2011	4,287.31	2,388.68	0.00	1,898.63	0.00	0.00
78388J106	SBA COMMUNICATIONS CORP	SBAC	50.0000	02/01/2013	Various	3,497.92	1,919.33	0.00	1,578.59	0.00	0.00
833034101	SNAP ON INC	SNA	100.0000	01/31/2013	12/13/2011	8,105.72	5,058.55	0.00	3,047.17	0.00	0.00
868157108	SUPERIOR ENERGY SERVICES INCOME	SPN	150.0000	01/31/2013	10/17/2011	3,742.41	3,871.14	0.00	-128.73	0.00	0.00
882681109	TEXAS ROADHOUSE INC CL A	TXRH	140.0000	01/31/2013	02/09/2011	2,443.92	2,479.32	0.00	-35.40	0.00	0.00
872540109	TJX COMPANIES	TJX	175.0000	10/29/2013	Various	10,435.06	5,910.30	0.00	4,524.76	0.00	0.00
892356106	TRACTOR SUPPLY CO	TSCO	300.0000	10/29/2013	Various	21,518.65	10,686.37	0.00	10,832.28	0.00	0.00
904311107	UNDER ARMOUR INC-CLASS A	UA	425.0000	09/04/2013	Various	31,712.98	20,045.27	0.00	11,667.71	0.00	0.00
904311107	UNDER ARMOUR INC-CLASS A	UA	50.0000	10/29/2013	04/11/2012	4,004.43	2,350.51	0.00	1,653.92	0.00	0.00

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2013 Tax Information Statement

Page 27 of 51

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

Recipient's Tax ID Number:
[REDACTED]
Payer's Federal ID Number:
38-2641093
Payer's State ID Number:
90-0138321

MI
(616)454-2852

Questions?

☐ Corrected

☐ 2nd TIN notice

Recipient's Name and Address:
SECCHIA FAMILY FOUNDATION
C/O M SCHUT - H & S COMPANIES
4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

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Covered (Box 6a is not checked)

CUSIP		Description (Box 8)		Stock or Other Symbol (Box 1d)		Stocks Bonds, etc. (Box 2a)		Cost or Other Basis (Box 3)		Wash Sale Loss Disallowed (Box 5)		Net Gain or Loss (Box 4)		Federal Income Tax Withheld (Box 15)	
Quantity Sold	Date of Sale or Exchange	Date of Acquisition	(Box 1a)	(Box 1b)	(Box 2a)	(Box 3)	(Box 5)	(Box 4)	(Box 15)	(Box 15)	(Box 15)	(Box 15)	(Box 15)	(Box 15)	(Box 15)
918204108	25 0000	01/31/2013	12/01/2011	VFC	3,688.91	3,461.32	0.00	227.59	0.00	0.00	0.00	0.00	0.00	0.00	0.00
918204108	75 0000	07/01/2013	12/01/2011	VFC	14,688.49	10,383.94	0.00	4,304.55	0.00	0.00	0.00	0.00	0.00	0.00	0.00
918204108	25 0000	10/29/2013	12/01/2011	VZ	5,405.65	3,461.32	0.00	1,944.33	0.00	0.00	0.00	0.00	0.00	0.00	0.00
92343V104	100 0000	01/31/2013	04/05/2011	VZ	4,374.91	3,856.90	0.00	518.01	0.00	0.00	0.00	0.00	0.00	0.00	0.00
92343V104	575 0000	05/10/2013	Various	V	30,273.14	21,731.18	0.00	8,541.96	0.00	0.00	0.00	0.00	0.00	0.00	0.00
92826C839	50 0000	10/29/2013	08/06/2012	GRA	10,193.32	6,584.50	0.00	3,608.82	0.00	0.00	0.00	0.00	0.00	0.00	0.00
38388F108	50 0000	01/31/2013	05/16/2011	GRA	3,599.01	2,187.88	0.00	1,411.13	0.00	0.00	0.00	0.00	0.00	0.00	0.00
38388F108	40 0000	03/25/2013	05/16/2011	GRA	3,076.66	1,750.30	0.00	1,326.36	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Total Long Term Sales Reported on 1099-B					560,071.37	437,188.85	0.00	122,882.51	0.00	0.00	0.00	0.00	0.00	0.00	0.00

Report on Form 8949, Part II, with Box D checked

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2013 Tax Information Statement

Page 28 of 51

Recipient's Name and Address:

SECCHIA FAMILY FOUNDATION
C/O M SCHUT - H & S COMPANIES
4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

Recipient's Tax ID Number: 38-2641093

Payer's Federal ID Number: 90-0138321

Payer's State ID Number:

State: MI (616)454-2852

Questions?

☐ Corrected ☐ 2nd TIN notice

Payer's Name and Address:

LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

2013 Form 1099-B: Proceeds from Broker and Barter Exchange Transactions

OMB No. 1545-0715

Reported to the IRS is Sales Price of stocks, bonds, etc., less commissions and option premiums.

For noncovered securities (Box 6a is checked) shown on this statement, cost basis information including wash sale disallowed loss is not being reported to the IRS.

Cusip	Description (Box 8)	Quantity Sold (Box 1e)	Date of Sale or Exchange (Box 1a)	Stock or Other Symbol (Box 1d)	Cost or Other Basis (Box 2a)	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
Short Term Sales Reported on 1099-B									
20441W203	COMPANHIA DE BEBIDAS-PR ADR			ABV					
1050 0000	03/29/2013 Various				0.12	0.00	0.12	0.00	0.00
Total Short Term Sales Reported on 1099-B					0.12	0.00	0.12	0.00	0.00
Report on Form 8949, Part I, with Box B checked									
Long Term Sales Reported on 1099-B									
003021714	ABERDEEN EMERG MKTS INST-IS			ABEMX					
1883 2390	01/31/2013 08/03/2011				30,000.00	27,664.78	2,335.22	0.00	0.00
005125109	ACXIOM CORP			ACXM					
110 0000	02/01/2013 10/18/2010				1,961.22	1,970.54	-9.32	0.00	0.00
005125109	ACXIOM CORP			ACXM					
85.0000	12/20/2013 10/18/2010				3,250.73	1,522.69	1,728.04	0.00	0.00
008252108	AFFILIATED MANAGERS GROUP INC			AMG					
25 0000	02/01/2013 10/14/2010				3,610.38	2,136.03	1,474.35	0.00	0.00

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2013 Tax Information Statement

Page 29 of 51

Payer's Name and Address:

LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

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38-2641093

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SECCHIA FAMILY FOUNDATION
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4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

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Cusip	Description (Box 8)	Date of Sale or Exchange	Date of Acquisition	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
(Box 1e) 008252108	(Box 1a) AFFILIATED MANAGERS GROUP INC			AMG					
20.0000	07/01/2013	10/14/2010		3,237.97	1,708.83	0.00	1,529.14	0.00	0.00
012653101	ALBEMARLE CORP			ALB					
45.0000	02/01/2013	10/18/2010		2,774.87	2,174.72	0.00	600.15	0.00	0.00
012653101	ALBEMARLE CORP			ALB					
195.0000	12/18/2013	10/18/2010		12,535.02	9,423.76	0.00	3,111.26	0.00	0.00
018581108	ALLIANCE DATA SYSTEMS CORP			ADS					
55.0000	01/31/2013	10/15/2010		8,638.27	3,738.76	0.00	4,899.51	0.00	0.00
018581108	ALLIANCE DATA SYSTEMS CORP			ADS					
80.0000	11/21/2013	10/15/2010		19,507.78	5,438.20	0.00	14,069.58	0.00	0.00
031100100	AMETEK INC NEW			AME					
55.0000	01/31/2013	10/14/2010		2,252.19	1,202.55	0.00	1,049.64	0.00	0.00
000807785	ASTON BARINGS INTL FUND-I			ABIX					
81170.9670	06/24/2013 Various			560,891.38	596,401.55	0.00	-35,510.17	0.00	0.00
049513104	ATMEL CORP			ATML					
300.0000	02/01/2013	10/19/2010		2,045.95	2,442.00	0.00	-396.05	0.00	0.00
050095108	ATWOOD OCEANICS INC			ATW					
45.0000	02/01/2013	10/19/2010		2,416.94	1,425.69	0.00	991.25	0.00	0.00
Y0486S104	AVAGO TECHNOLOGIES LTD			AVGO					
40.0000	01/31/2013	10/20/2010		1,433.56	892.95	0.00	540.61	0.00	0.00

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2013 Tax Information Statement

Page 30 of 51

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SECCHIA FAMILY FOUNDATION
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Cusip		Description (Box 8)		Stock or Other Symbol (Box 1d)					
	Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks Bonds, etc.	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld	State Tax Withheld
	(Box 1e)	(Box 1a)		(Box 2a)				(Box 4)	(Box 15)
Y0486S104	160.0000	10/29/2013	10/20/2010	AVGO	7,369.36	0.00	3,797.57	0.00	0.00
073302101		B/E AEROSPACE INC		BEAV					
	70.0000	01/31/2013	Various	3,539.11	2,563.30	0.00	975.81	0.00	0.00
077454106		BELDEN INC		BDC					
	85.0000	01/31/2013	10/19/2010	4,107.27	2,342.01	0.00	1,765.26	0.00	0.00
077454106		BELDEN INC		BDC					
	50.0000	04/01/2013	10/19/2010	2,526.59	1,377.66	0.00	1,148.93	0.00	0.00
143130102		CARMAX INC		KMX					
	80.0000	01/31/2013	10/13/2010	3,136.47	2,360.80	0.00	775.67	0.00	0.00
143130102		CARMAX INC		KMX					
	75.0000	05/20/2013	10/13/2010	3,582.31	2,213.25	0.00	1,369.06	0.00	0.00
167250109		CHICAGO BRIDGE & IRON CO		CBI					
	70.0000	02/01/2013	10/14/2010	3,592.92	1,798.23	0.00	1,794.69	0.00	0.00
20441W203		COMPANHIA DE BEBIDAS-PR ADR		ABV					
	200.0000	01/31/2013	02/10/2009	9,319.81	1,750.66	0.00	7,569.15	0.00	0.00
20441W203		COMPANHIA DE BEBIDAS-PR ADR		ABV					
	1050.0000	07/01/2013	Various	39,468.92	9,179.05	0.00	30,289.87	0.00	0.00
206708109		CONCUR TECHNOLOGIES INC		CNQR					
	30.0000	02/04/2013	10/14/2010	1,998.55	1,460.63	0.00	537.92	0.00	0.00

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Cusip	Description (Box 8)	Date of Sale or Exchange	Date of Acquisition	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
206708109	CONCUR TECHNOLOGIES INC			CNQR					
55.0000	04/03/2013	10/14/2010		3,639.46	2,677.83	0.00	961.63	0.00	0.00
216648402	COOPER COS INC			COO					
65.0000	01/31/2013	10/15/2010		6,587.05	3,284.17	0.00	3,302.88	0.00	0.00
216648402	COOPER COS INC			COO					
75.0000	10/16/2013	10/15/2010		9,589.44	3,789.43	0.00	5,800.01	0.00	0.00
N22717107	CORE LABORATORIES NV			CLB					
20.0000	01/31/2013	10/19/2010		2,530.92	1,711.08	0.00	819.84	0.00	0.00
225448208	CREDIT SUISSE GUERNSEY 7 900% PFD								
1250.0000	03/28/2013	02/11/2009		31,250.00	23,125.00	0.00	8,125.00	0.00	0.00
268648102	EMC CORP MASS			EMC					
1500.0000	07/01/2013	02/10/2009		35,625.28	18,028.65	0.00	17,596.63	0.00	0.00
29275Y102	ENERSYS			ENS					
65.0000	01/31/2013	10/14/2010		2,655.63	1,694.54	0.00	961.09	0.00	0.00
30231G102	EXXONMOBIL CORP			XOM					
75.0000	01/31/2013	11/28/2007		6,801.59	6,528.65	0.00	272.94	0.00	0.00
315616102	F5 NETWORKS INC			FFIV					
40.0000	01/31/2013	10/13/2010		4,197.60	3,851.09	0.00	346.51	0.00	0.00
34354P105	FLOWERVE CORP			FLS					
20.0000	01/31/2013	10/19/2010		3,140.33	2,229.38	0.00	910.95	0.00	0.00

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2013 Tax Information Statement

Recipient's Name and Address:

SECCHIA FAMILY FOUNDATION
C/O M SCHUT - H & S COMPANIES
4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

38-2641093

90-0138321

MI

(616)454-2852

☐ 2nd TIN notice

Payer's Name and Address:

LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

State:

Questions?

☐ Corrected

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Cusip	Description (Box 8)	Stock or Other Symbol (Box 1d)	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
Quantity Sold	Date of Sale or Exchange	Date of Acquisition						
(Box 1e)	(Box 1a)							
34354P105	FLOWERVE CORP		FLS					
15.0000	02/22/2013	10/19/2010	2,404.07	1,672.04	0.00	732.03	0.00	0.00
371901109	GENTEX CORP		GNTX					
90.0000	02/01/2013	10/21/2010	1,746.26	1,847.64	0.00	-101.38	0.00	0.00
371901109	GENTEX CORP		GNTX					
460.0000	05/23/2013	10/21/2010	11,014.64	9,443.47	0.00	1,571.17	0.00	0.00
45103T107	ICON PLC SPONSORED ADR		ICLR					
85.0000	01/31/2013	10/20/2010	2,487.09	1,781.11	0.00	705.98	0.00	0.00
48122F207	JP MORGAN CHASE CAP XIV 6.200% PFD							
2500.0000	05/08/2013	02/11/2009	62,500.00	47,000.00	0.00	15,500.00	0.00	0.00
489170100	KENNAMETAL INC.		KMT					
70.0000	01/23/2013	10/15/2010	2,961.63	2,286.40	0.00	675.23	0.00	0.00
489170100	KENNAMETAL INC.		KMT					
75.0000	01/31/2013	10/15/2010	3,042.24	2,449.71	0.00	592.53	0.00	0.00
489170100	KENNAMETAL INC.		KMT					
35.0000	03/22/2013	10/15/2010	1,385.78	1,143.20	0.00	242.58	0.00	0.00
489170100	KENNAMETAL INC.		KMT					
235.0000	07/11/2013	10/15/2010	9,543.72	7,675.75	0.00	1,867.97	0.00	0.00
515098101	LANDSTAR SYSTEMS INC		LSTR					
40.0000	02/04/2013	10/14/2010	2,279.14	1,500.70	0.00	778.44	0.00	0.00

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2013 Tax Information Statement

Page 33 of 51

Payer's Name and Address:

LEGACY TRUST
300 OTTAWA NW, SUITE 600
GRAND RAPIDS, MI 49503

Recipient's Tax ID Number:

38-2641093

Payer's Federal ID Number:

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Cusip	Description (Box 8)	Date of Sale or Exchange	Date of Acquisition	Stocks or Other Symbol (Box 1d)	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
(Box 1e)	(Box 1a)			(Box 2a)					
515098101	LANDSTAR SYSTEMS INC	10/04/2013	10/14/2010	LSTR	5,627.62	0.00	2,675.26	0.00	0.00
53217R207	LIFE TIME FITNESS			LTM					
125.0000		01/31/2013	10/14/2010		5,187.44	0.00	1,146.41	0.00	0.00
501889208	LKQ CORP			LKQ					
145.0000		02/01/2013	10/21/2010		1,588.92	0.00	1,669.39	0.00	0.00
501889208	LKQ CORP			LKQ					
165.0000		02/28/2013	10/21/2010		1,808.08	0.00	1,747.77	0.00	0.00
596278101	MIDDLEBY CORP			MIDD					
20.0000		01/23/2013	10/13/2010		1,383.31	0.00	1,406.92	0.00	0.00
596278101	MIDDLEBY CORP			MIDD					
35.0000		01/31/2013	10/13/2010		2,420.79	0.00	2,552.80	0.00	0.00
596278101	MIDDLEBY CORP			MIDD					
35.0000		02/27/2013	10/13/2010		2,420.79	0.00	2,852.16	0.00	0.00
596278101	MIDDLEBY CORP			MIDD					
30.0000		07/19/2013	10/13/2010		2,074.96	0.00	3,542.11	0.00	0.00
553530106	MSC INDL DIRECT INC CL A			MSM					
45.0000		02/01/2013	10/14/2010		2,460.77	0.00	1,107.59	0.00	0.00
64128K868	NEUBERGER BERMAN HI IN B-INS			NBXX					
12850.4670		01/31/2013	10/07/2011		110,000.00	0.00	12,464.95	0.00	0.00

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4575 LAKE MICHIGAN DRIVE NW
GRAND RAPIDS, MI 49534

Recipient's Tax ID Number: 38-2641093

Payer's Federal ID Number: 90-0138321

Payer's State ID Number: MI

State: (616)454-2852

Questions?

☐ Corrected ☐ 2nd TIN notice

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LEGACY TRUST
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Cusip	Description (Box 8)	Date of Sale or Exchange	Stocks Bonds, etc. (Box 2a)	Cost or Other Basis	Wash Sale Loss Disallowed	Net Gain or Loss	Federal Income Tax Withheld (Box 4)	State Tax Withheld (Box 15)
653656108	NICE SYSTEMS LTD SPONS ADR	02/01/2013	2,952.26	2,586.40	0.00	365.86	0.00	0.00
67020Y100	NUANCE COMMUNICATIONS INC	06/05/2013	6,045.18	4,845.98	0.00	1,199.20	0.00	0.00
682680103	ONEOK INC NEW	05/10/2013	36,251.25	16,881.12	0.00	19,370.13	0.00	0.00
703395103	PATTERSON COS INC	01/16/2013	6,782.15	5,354.61	0.00	1,427.54	0.00	0.00
722005667	PIMCO COMMODITY RR STRAT-INS	01/31/2013	126,141.64	124,289.34	0.00	1,852.30	0.00	0.00
18523 0010	PIMCO UNCONSTRAINED BOND FUND-INS	01/31/2013	297,703.78	283,561.30	0.00	14,142.48	0.00	0.00
72201M487	POLYCOM INC	01/23/2013	2,452.88	2,928.29	0.00	-475.41	0.00	0.00
25819 9290	RESMED INC	02/01/2013	3,325.42	2,387.25	0.00	938.17	0.00	0.00
73172K104	ROVI CORP	01/31/2013	1,567.76	4,513.99	0.00	-2,946.23	0.00	0.00
210 0000	ROVI CORP	11/12/2013	2,988.49	8,777.19	0.00	-5,788.70	0.00	0.00

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2013 Tax Information Statement

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LEGACY TRUST
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(Box 1e) 803062108	(Box 1a) SAPIENT CORP										
305.0000	02/01/2013	10/14/2010			SAPE	3,733.57	3,694.04	0.00	39.53	0.00	0.00
817565104	SERVICE CORP INTERNATIONAL				SCI						
185.0000	02/01/2013	10/14/2010			SWN	2,770.03	1,602.10	0.00	1,167.93	0.00	0.00
845467109	SOUTHWESTERN ENERGY COMPANY COM				SRCL						
35.0000	02/01/2013	10/15/2010			SRCL	1,206.07	1,206.36	0.00	-0.29	0.00	0.00
858912108	STERICYCLE INC COM				SRCL						
20.0000	02/01/2013	10/15/2010			SRCL	1,895.72	1,429.44	0.00	466.28	0.00	0.00
858912108	STERICYCLE INC COM				SYNT						
15.0000	12/20/2013	10/15/2010			TER	1,709.98	1,072.08	0.00	637.90	0.00	0.00
87162H103	SYNTEL INC				TER						
20.0000	01/31/2013	10/15/2010			TGVIX	1,165.31	930.89	0.00	234.42	0.00	0.00
880770102	TERADYNE INC				TGVIX						
100.0000	01/31/2013	10/13/2010			TGVIX	1,620.96	1,137.00	0.00	483.96	0.00	0.00
885215566	THORNBURG INTL VALUE FDI				TGVIX						
216.3470	01/30/2013	08/03/2011			TGVIX	6,364.93	6,124.78	0.00	240.15	0.00	0.00
885215566	THORNBURG INTL VALUE FDI				TGVIX						
9490.8480	01/31/2013	Various			TSCO	278,936.03	232,472.57	0.00	46,463.46	0.00	0.00
892356106	TRACTOR SUPPLY CO				TSCO						
15.0000	01/23/2013	10/13/2010			TSCO	1,380.41	599.63	0.00	780.78	0.00	0.00

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Quantity Sold	Date of Sale or Exchange	Date of Acquisition	Stocks, Bonds, etc.	(Box 2a)	(Box 2a)	(Box 2a)	(Box 2a)	(Box 2a)	(Box 2a)	(Box 2a)	(Box 2a)	(Box 2a)	(Box 2a)	(Box 2a)	(Box 2a)
892356106	35.0000	01/31/2013	10/13/2010	TRACTOR SUPPLY CO	TSCO	3,583.60	1,399.13	0.00	0.00	2,184.47	0.00	0.00	0.00	0.00	0.00
892356106	20.0000	07/01/2013	10/13/2010	TRACTOR SUPPLY CO	TSCO	2,328.24	799.50	0.00	0.00	1,528.74	0.00	0.00	0.00	0.00	0.00
911163103	55.0000	01/31/2013	10/25/2010	UNITED NAT FOODS INC	UNFI	2,948.76	2,021.45	0.00	0.00	927.31	0.00	0.00	0.00	0.00	0.00
G87210103	140.0000	01/31/2013	10/21/2010	UTI WORLDWIDE INC	UTIW	2,036.15	2,642.29	0.00	0.00	-606.14	0.00	0.00	0.00	0.00	0.00
92343V104	780.0000	05/10/2013	11/30/2010	VERIZON COMMUNICATIONS	VZ	41,066.16	24,718.20	0.00	0.00	16,347.96	0.00	0.00	0.00	0.00	0.00
928645100	70.0000	01/31/2013	10/20/2010	VOLCANO CORP	VOLC	1,750.00	1,718.97	0.00	0.00	31.03	0.00	0.00	0.00	0.00	0.00
928645100	295.0000	03/26/2013	10/20/2010	VOLCANO CORP	VOLC	6,554.75	7,244.22	0.00	0.00	-689.47	0.00	0.00	0.00	0.00	0.00
Total Long Term Sales Reported on 1099-B						1,951,978.96	1,712,391.07	0.00	0.00	239,587.89	0.00	0.00	0.00	0.00	0.00

Report on Form 8949, Part II, with Box E checked

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