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Form

990-PF

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

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

OMB No 1545-0052

2013

Open to Public Inspection

For calendar year 2013, or tax year beginning 01-01-2013 , and ending 12-31-2013

Name of foundation IACOCCA FAMILY FOUNDATION		A Employer identification number 38-6071154	
Number and street (or P O box number if mail is not delivered to street address) 867 BOYLSTON STREET 6TH FLOOR		B Telephone number (see instructions) (617) 267-7747	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02116		C If exemption application is pending, check here <input type="checkbox"/>	
G Check all that apply <input type="checkbox"/> Initial return <input type="checkbox"/> Final return <input type="checkbox"/> Address change <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Amended return <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>	
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 39,741,871	J Accounting method <input type="checkbox"/> Other (specify) _____ (Part I, column (d) must be on cash basis.)	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>	

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	238,531			
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities.	885,660	885,660		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	283,173			
	b Gross sales price for all assets on line 6a 4,738,408				
	7 Capital gain net income (from Part IV, line 2) . . .		283,173		
	8 Net short-term capital gain				
	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	1,407,364	1,168,833		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	393,215	39,321		353,894
	14 Other employee salaries and wages	28,623	2,862		25,761
	15 Pension plans, employee benefits	19,449	1,945		17,504
	16a Legal fees (attach schedule)	70,979	0		70,279
	b Accounting fees (attach schedule)	38,866	3,887		32,804
	c Other professional fees (attach schedule)	31,030	442		30,588
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	37,011	2,201		19,810
	19 Depreciation (attach schedule) and depletion . . .	9,326	0		
	20 Occupancy	89,713	8,971		78,743
	21 Travel, conferences, and meetings	39,497	19,749		19,749
	22 Printing and publications	1,564	156		1,408
	23 Other expenses (attach schedule)	97,090	9,710		87,380
	24 Total operating and administrative expenses. Add lines 13 through 23	856,363	89,244		737,920
	25 Contributions, gifts, grants paid	1,364,235			2,246,955
	26 Total expenses and disbursements. Add lines 24 and 25	2,220,598	89,244		2,984,875
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-813,234			
	b Net investment income (if negative, enter -0-)		1,079,589		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)			Beginning of year	End of year	
					(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			914,088	787,058	787,058
	2	Savings and temporary cash investments					
	3	Accounts receivable ▶ <u>316,821</u>					
		Less allowance for doubtful accounts ▶ _____			260,353	316,821	316,821
	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 (attach schedule) ▶ _____					
		Less allowance for doubtful accounts ▶ _____					
	8	Inventories for sale or use					
	9	Prepaid expenses and deferred charges			7,284	4,565	4,565
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)			942,428	855,051	855,051
	c	Investments—corporate bonds (attach schedule).					
	11	Investments—land, buildings, and equipment basis ▶ _____					
Liabilities		Less accumulated depreciation (attach schedule) ▶ _____					
	12	Investments—mortgage loans					
	13	Investments—other (attach schedule)			31,421,661	35,758,951	35,758,951
	14	Land, buildings, and equipment basis ▶ <u>76,592</u>					
		Less accumulated depreciation (attach schedule) ▶ <u>53,675</u>			28,601	22,917	22,917
	15	Other assets (describe ▶ _____)			1,940,725	1,996,508	1,996,508
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)			35,515,140	39,741,871	39,741,871
	17	Accounts payable and accrued expenses			1,760	9,506	
	18	Grants payable			1,945,000	1,210,000	
	19	Deferred revenue					
	20	Loans from officers, directors, trustees, and other disqualified persons					
	21	Mortgages and other notes payable (attach schedule)					
	22	Other liabilities (describe ▶ _____)					
	23	Total liabilities (add lines 17 through 22)			1,946,760	1,219,506	
Net Assets or Fund Balances		Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted			33,568,380	38,522,365	
	25	Temporarily restricted					
	26	Permanently restricted					
		Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/> and complete lines 27 through 31.					
	27	Capital stock, trust principal, or current funds					
	28	Paid-in or capital surplus, or land, bldg , and equipment fund					
	29	Retained earnings, accumulated income, endowment, or other funds					
	30	Total net assets or fund balances (see page 17 of the instructions)			33,568,380	38,522,365	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)			35,515,140	39,741,871	

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	33,568,380
2	Enter amount from Part I, line 27a	2	-813,234
3	Other increases not included in line 2 (itemize) ▶ _____	3	5,767,219
4	Add lines 1, 2, and 3	4	38,522,365
5	Decreases not included in line 2 (itemize) ▶ _____	5	0
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6	38,522,365

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1 a	VARIOUS		2013-01-01	2013-12-31
b	VARIOUS		2013-01-01	2013-12-31
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 58,546		57,906	640
b 4,679,862		4,397,329	282,533
c			
d			
e			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			640
b			282,533
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	283,173
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8		3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2012	3,804,607	36,412,759	0 104486
2011	3,746,410	37,496,244	0 099914
2010	2,307,911	38,020,563	0 060702
2009	3,092,540	33,983,247	0 091002
2008	3,947,861	41,882,815	0 094260

2 Total of line 1, column (d).	2	0 450364
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 090073
4 Enter the net value of noncharitable-use assets for 2013 from Part X, line 5.	4	36,989,272
5 Multiply line 4 by line 3.	5	3,331,735
6 Enter 1% of net investment income (1% of Part I, line 27b).	6	10,796
7 Add lines 5 and 6.	7	3,342,531
8 Enter qualifying distributions from Part XII, line 4.	8	2,984,875

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See
the Part VI instructions

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)		
1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1		
Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)		
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b	1	21,592
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	21,592
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	21,592
6 Credits/Payments		
a 2013 estimated tax payments and 2012 overpayment credited to 2013	6a	43,868
b Exempt foreign organizations—tax withheld at source	6b	
c Tax paid with application for extension of time to file (Form 8868)	6c	
d Backup withholding erroneously withheld	6d	
7 Total credits and payments. Add lines 6a through 6d.	7	43,868
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached.	8	
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	22,276
11 Enter the amount of line 10 to be Credited to 2014 estimated tax 22,276 Refunded	11	0

Part VII-A Statements Regarding Activities			
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	Yes	No
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)? <i>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.</i>	1b		No
c Did the foundation file Form 1120-POL for this year?	1c		No
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation <input type="checkbox"/> \$ 0 (2) On foundation managers <input type="checkbox"/> \$ 0			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If "Yes," attach a detailed description of the activities.</i>	2		No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	3		No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If "Yes," attach the statement required by General Instruction T.</i>	5		No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes	
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col. (c), and Part XV.</i>	7	Yes	
8a Enter the states to which the foundation reports or with which it is registered (see instructions): <input type="checkbox"/> MA, MI			
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? <i>If "No," attach explanation.</i>	8b	Yes	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2013 or the taxable year beginning in 2013 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i>	9		No
10 Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses.</i>	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	Yes	
Website address ▶IACOCCAFOUNDATION.ORG				
14	The books are in care of ▶THE FOUNDATION Telephone no ▶(617) 267-7747			
Located at ▶867 BOYLSTON STREET 6TH FLOOR BOSTON MA ZIP +4 ▶02116				
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here ▶ <input type="checkbox"/>			
and enter the amount of tax-exempt interest received or accrued during the year ▶		15		
16	At any time during calendar year 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?	16	Yes	No
See instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country ▶				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly)			
(1) Engage in the sale or exchange, or leasing of property with a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input checked="" type="checkbox"/> Yes <input type="checkbox"/> No				
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No				
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. . . Organizations relying on a current notice regarding disaster assistance check here. ▶ <input type="checkbox"/>	1b		No
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2013?.	1c		No
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))			
a	At the end of tax year 2013, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2013?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ▶ 20____, 20____, 20____, 20____			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement—see instructions).	2b		
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ▶ 20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?. <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If "Yes," did it have excess business holdings in 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? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2013.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2013?	4b		No

Part VII-B

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

5a

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

(1)

Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

YesNo

(2)

Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

YesNo

(3)

Provide a grant to an individual for travel, study, or other similar purposes?

YesNo

(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).

YesNo

(5)

Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

YesNo

5b

If any answer is "Yes" to 5a(1)–(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

YesNo

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

c

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

YesNo

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

6a

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

YesNo

6b

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

YesNo

If "Yes" to 6b, file Form 8870.

7a

At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?

YesNo

7b

If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

YesNo

Part VIII

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

1

List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
See Additional Data Table				

2

Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."

(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
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
BURNS & LEVINSON LLP	LEGAL SERVICES	70,979
125 SUMMER STREET BOSTON,MA 02110		
Total number of others receiving over \$50,000 for professional services.		0

Part IX-A

Summary of Direct Charitable Activities

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

Part IX-B

Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1	
2	
All other program-related investments. See page 24 of the instructions	
3	
Total. Add lines 1 through 3	0

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions.)

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc , purposes		
a	Average monthly fair market value of securities.	1a	31,892,124
b	Average of monthly cash balances.	1b	2,847,107
c	Fair market value of all other assets (see instructions).	1c	2,813,329
d	Total (add lines 1a, b, and c).	1d	37,552,560
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	37,552,560
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	563,288
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	36,989,272
6	Minimum investment return. Enter 5% of line 5.	6	1,849,464

Part XI

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

1	Minimum investment return from Part X, line 6.	1	1,849,464
2a	Tax on investment income for 2013 from Part VI, line 5.	2a	21,592
b	Income tax for 2013 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	21,592
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	1,827,872
4	Recoveries of amounts treated as qualifying distributions.	4	147,720
5	Add lines 3 and 4.	5	1,975,592
6	Deduction from distributable amount (see instructions).	6	0
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	1,975,592

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	2,984,875
b	Program-related investments—total from Part IX-B.	1b	0
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc , purposes.	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	
b	Cash distribution test (attach the required schedule).	3b	
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	2,984,875
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	0
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	2,984,875
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				1,975,592
2 Undistributed income, if any, as of the end of 2013				
a Enter amount for 2012 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2013				
a From 2008.	1,883,210			
b From 2009.	1,404,788			
c From 2010.	426,896			
d From 2011.	1,889,298			
e From 2012.	2,013,079			
f Total of lines 3a through e.	7,617,271			
4 Qualifying distributions for 2013 from Part XII, line 4 ▶ \$ 2,984,875				
a Applied to 2012, but not more than line 2a			0	
b Applied to undistributed income of prior years (Election required—see instructions).		0		
c Treated as distributions out of corpus (Election required—see instructions).	0			
d Applied to 2013 distributable amount.				1,975,592
e Remaining amount distributed out of corpus	1,009,283			
5 Excess distributions carryover applied to 2013 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	8,626,554			
b Prior years' undistributed income Subtract line 4b from line 2b.		0		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.		0		
d Subtract line 6c from line 6b Taxable amount—see instructions		0		
e Undistributed income for 2012 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2013 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2014				0
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions).	0			
8 Excess distributions carryover from 2008 not applied on line 5 or line 7 (see instructions). . . .	1,883,210			
9 Excess distributions carryover to 2014. Subtract lines 7 and 8 from line 6a	6,743,344			
10 Analysis of line 9				
a Excess from 2009. . . .	1,404,788			
b Excess from 2010. . . .	426,896			
c Excess from 2011. . . .	1,889,298			
d Excess from 2012. . . .	2,013,079			
e Excess from 2013. . . .	1,009,283			

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.

b

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

☐ 4942(j)(3) or ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
		(a) 2013	(b) 2012	(c) 2011	(d) 2010	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed					
d	Amounts included in line 2c not used directly for active conduct of exempt activities					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

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

1

Information Regarding Foundation Managers:

a

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

LIDO A IACOCCA

b

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

2

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

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

KATHRYN IACOCCA HENTZ
867 BOYLSTON STREET 6TH FLOOR
BOSTON,MA 02116
(617) 267-7747

b

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

GRANT APPLICATION AT WWW.IACOCCAFUNDATION.ORG

c

Any submission deadlines

FEBRUARY 1

d

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

PRIMARILY CONCERNED WITH DIABETES RESEARCH - RELATED ACTIVITIES

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 <i>Paid during the year</i> See Additional Data Table				
Total			3a	2,246,955
b <i>Approved for future payment</i> See Additional Data Table				
Total			3b	1,210,000

Enter gross amounts unless otherwise indicated

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

Form **990-PF** (2013)

Part XVII

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

1

Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?

a

Transfers from the reporting foundation to a noncharitable exempt organization of

(1)

Cash.

(2)

Other assets.

b

Other transactions

(1)

Sales of assets to a noncharitable exempt organization.

(2)

Purchases of assets from a noncharitable exempt organization.

(3)

Rental of facilities, equipment, or other assets.

(4)

Reimbursement arrangements.

(5)

Loans or loan guarantees.

(6)

Performance of services or membership or fundraising solicitations.

c

Sharing of facilities, equipment, mailing lists, other assets, or paid employees.

d

If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.

Yes

No

1a(1)

No

1a(2)

No

1b(1)

No

1b(2)

No

1b(3)

No

1b(4)

No

1b(5)

No

1b(6)

No

1c

No

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

2a

Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527?

Yes

No

b

If "Yes," complete the following schedule

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

Sign Here

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

Signature of officer or trustee

2014-05-08

Date

Title

May the IRS discuss this return with the preparer shown below (see instr.)?

Yes

No

Paid Preparer Use Only

Print/Type preparer's name
THOMAS WASHBURN
CPA

Preparer's Signature

Date
2014-05-08

Check if self-employed ☐

PTIN
P00537319

Firm's name
ALEXANDER ARONSON FINNING & CO PC

Firm's EIN
04-2571780

Firm's address
21 EAST MAIN STREET WESTBORO, MA 01581


Phone no
(508) 366-9100

Form 990-PF (2013)


Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
LIDO A IACOCCA	CHAIRMAN 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
KATHRYN IACOCCA HENTZ	PRESIDENT 20 00	160,000	37,875	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
JOHN D GERACE	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
EDWARD BOUSA	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
LOUIS E LATAIF	SECRETARY/TREASURER 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
LIA IACOCCA-ASSAD	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
DESMOND HEATHWOOD	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
KENNETH ANDERSON	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				
MARGARET LAURENCE	EXECUTIVE DIRECTOR 40 00	174,821	20,519	0
867 BOYLSTON STREET 6TH FLOOR BOSTON,MA 02116				


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
HOAG HOSPITAL FOUNDATION 500 SUPERIOR AVENUE NEWPORT BEACH,CA 92663		PC	RESTRICTED	1,500
KEEP MEMORY ALIVE 888 W BONNEVILLE AVENUE LAS VEGAS,NV 89106		PC	2013 DONATION - UNRESTRICTED	10,000
YELLOWSTONE RECOVERY 154 E BAY STREET COSTA MESA,CA 92627		PC	2013 DONATION - UNRESTRICTED	5,000
ZENO MOUNTAIN FARM 950 ZENO ROAD LINCOLN,VT 05443		PC	2013 DONATION - UNRESTRICTED	10,000
SACRED HEART CATHOLIC CHURCH 43775 DEEP CANYON ROAD PALM DESERT,CA 92660		PC	2013 DONATION - RESTRICTED	15,000
SAN GABRIEL JR GOLF INC PO BOX 1675 DUARTE,CA 90019		PC	2013 DONATION - UNRESTRICTED	5,000
B SINATRA CHILDREN'S CTR N HOWER 39000 BOB HOPE DRIVE RANCHO MIRAGE,CA 92270		PC	2013 DONATION - UNRESTRICTED	5,000
OCEAN VIEW FARMS INC PO BOX 66534 LOS ANGELES,CA 90066		PC	2013 DONATION - UNRESTRICTED	5,000
SHRINERS HOSPITAL FOR CHILDREN 3160 GENEVA STREET LOS ANGELES,CA 90020		PC	2013 DONATION - UNRESTRICTED	5,000
PROMISES FOUNDATION PO BOX 662087 LOS ANGELES,CA 90066		PF	2013 DONATION - UNRESTRICTED	10,000
NATIONAL MS SOCIETY 12121 SCRIPPS SUMMIT DR SAN DIEGO,CA 92131		PC	2013 DONATION - RESTRICTED	1,000
ST MONICA CATHOLIC HIGH SCHOOL 1030 LINCOLN BLVD SANTA MONICA,CA 90403		PC	2013 DONATION - RESTRICTED	9,250
LA COUNTY POLICE CANINE ASSOCIATION 1223 WILSHIRE BLVD SANTA MONICA,CA 90403		PC	2013 DONATION - UNRESTRICTED	1,000
HANDEL AND HAYDN SOCIETY 300 MASSACHUSETTS AVE BOSTON,MA 02115		PC	2013 DONATION - UNRESTRICTED	1,000
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	2013 DONATION - RESTRICTED	30,000
Total  3a				2,246,955


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
ST MARGARET'S EPISCOPAL SCHOOL 31641 LANOVIA AVENUE SAN JUAN CAPISTRANO, CA 92675		PC	RESTRICTED	100,000
UNIVERSITY OF CALIFORNIA - IRVINE 101 ACADEMY WAY IRVINE, CA 92617		PC	2013 DONATION - RESTRICTED	10,000
LEHIGH UNIVERSITY 111 RESEARCH DRIVE IACocca HALL BETHLEHEM, PA 18015		PC	RESTRICTED	20,985
ALZHEIMER'S ASSOCIATION 17771 COWAN IRVICE, CA 92614		PC	2013 DONATION - UNRESTRICTED	10,000
FURRY ANGEL FOUNDATION 72-877 DINAH SHORE DRIVE RANCHO MIRAGE, CA 92270		PC	2013 DONATION - UNRESTRICTED	1,000
ST VINCENT MEALS ON WHEELS 2131 WEST THIRD STREET LOS ANGELES, CA 90057		PC	UNRESTRICTED DONATION	5,000
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO, CA 92675		PC	2013 DONATION UNRESTRICTED	1,800
YELLOWSTONE RECOVERY 154 E BAY STREET COSTA MESA, CA 92627		PC	RESTRICTED	5,000
CAMP TO BELONG PO BOX 1146 MARANA, AZ 85653		PC	2013 DONATION - UNRESTRICTED	1,000
HEARTFELT CARDIAC PROJECTS 1278 GLENNEYRE STREET 244 LAGUNA BEACH, CA 92651		PC	2013 DONATION - UNRESTRICTED	2,500
MASSACHUSETTS GENERAL HOSPITAL 165 CAMBRIDGE STREET BOSTON, MA 02114		PC	RESEARCH GRANT	500,000
JF SHEA THERAPUTIC RIDING CENTER 26284 OSO ROAD SAN JUAN CAPISTRANO, CA 92675		PC	2013 DONATION - UNRESTRICTED	1,000
PARTNERS IN HEALTH PO BOX 996 FREDERICK, MD 217059942		PC	2013 DONATION UNRESTRICTED	1,000
CAMPAIGN FOR CATHOLIC SCHOOLS 66 BROOKS DRIVE BRAINTREE, MA 02184		PC	2013 DONATION UNRESTRICTED	5,000
ARCHDIOCESE OF BOSTON 66 BROOKS DRIVE BRAINTREE, MA 02184		PC	2013 DONATION RESTRICTED	2,500
Total			 3a	2,246,955


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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
WGBH ONE GUEST STREET BOSTON,MA 02135		PC	2013 DONATION RESTRICTED	1,500
THE LINCOLN MOTOR CAR FOUNDATION 5022 HARBORTOWN LANE FORT MYERS,FL 339194651		PC	UNRESTRICTED DONATION	10,000
NANTUCKET COTTAGE HOSPITAL FOUNDATION 57 PROSPECT STREET NANTUCKET,MA 025542799		PC	RESTRICTED	13,250
ST MARY'S CHURCH 133 SCHOOL STREET WALTHAM,MA 02451		PC	RESTRICTED	6,000
UNIVERSITY OF SOUTHERN CALIFORNIA ATHLETICS 3501 WATT WAY LOS ANGELES,CA 90089		PC	RESTRICTED	100,000
BROADCASTERS FDN OF AMERICA 125 WEST 55TH STREET NEW YORK,NY 10019		PF	RESTRICTED	6,250
VANDERBILT UNIVERSITY MEDICAL CENTER 1400 18TH AVE SOUTH NASHVILL,TN 372122809		PC	2013 RESEARCH GRANT	276,249
THE UNIVERSITY OF CHICAGO 5801 SOUTH ELLIS AVENUE CHICAGO,IL 60637		PC	2013 RESEARCH GRANT	200,097
BETH ISRAEL DEACONESS MEDICAL CENTER 330 BROOKLINE AVENUE BOSTON,MA 02215		SOI	2013 RESEARCH GRANT	110,000
YALE UNIVERSITY 47 COLLEGE STREET SUITE 203 BOX 208047 NEW HAVEN,CT 025208047		PC	2013 RESEARCH GRANT	99,990
GIFT OF LIFE DONOR PROGRAM 401 N 3RD STREET PHILADELPHIA,PA 19123		SOI	UNRESTRICTED DONATION	25,000
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED	8,000
UNIVERSITY OF CALIFORNIA SAN FRANCISCO 1855 FOLSOM STREET SUITE 425 SAN FRANCISCO,CA 941430897		PC	2013 RESEARCH GRANT	76,525
UNIVERSITY OF ALABAMA AT BIRMINGHAM 1720 2ND AVENUE SOUTH BIRMAINGHAM,AL 35294		PC	2013 RESEARCH GRANT	236,489
BEAUMONT FOUNDATION PO BOX 5802 TROY,MI 480075802		PC	RESTRICTED	25,000
Total  3a				2,246,955

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
AMERICAN CAMPING ASSOCIATION 215 WYONEGONIC ROAD DENMARK,ME 040229989		PC	UNRESTRICTED DONATION	5,000
LUPUS LA 8383 WILSHIRE BLVD BEVERLY HILLS,CA 90211		PC	RESTRICTED	4,935
LUPUS LA 8383 WILSHIRE BLVD BEVERLY HILLS,CA 90211		PC	RESTRICTED	4,935
CAROLINA HEALTHCARE FNDN PO BOX 32861 CHARLOTTE,NC 28232		PC	2013 DONATION - UNRESTRICTED	2,000
CORNERSTONE SCHOOLS 6861 E NEVADA DETROIT,MI 48234		PC	2013 DONATION - RESTRICTED	5,000
FRIENDS OF ROBINSON GARDENS 1008 ELDEN WAY BEVERLY HILLS,CA 90210		PC	2013 DONATION - UNRESTRICTED	5,000
NANTUCKET GOLF CLUB FOUNDATION INC C/O NANTUCKET GOLF CLUB SIASCONSET,MA 02564		PC	RESTRICTED	1,000
MAKE IT RIGHT FOUNDATION PO BOX 58009 NEW ORLEANS,LA 70158		PC	2013 DONATION - UNRESTRICTED	1,000
BELIEVE IN SOBRIETY FOUNDATION 30025 ALICIA PARKWAY 195 LAGUNA NIGUEL,CA 92677		PC	RESTRICTED	2,500
LANDMARK SCHOOL PO BOX 227 PRIDES CROSSING,MA 01965		PC	2013 DONATION - UNRESTRICTED	10,000
ST CATHERINE OF SIENNA SCHOOL 30516 S COAST HIGHWAY LAGUNA BEACH,CA 92651		PC	2013 DONATION - RESTRICTED	1,500
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED	2,500
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED	7,500
ARCHDIOCESE OF BOSTON 66 BROOKS DRIVE BRAINTREE,MA 02184		PC	RESTRICTED	5,000
ZENO MOUNTAIN FARM 950 ZENO ROAD LINCOLN,VT 05443		PC	RESTRICTED	5,000
Total  3a				2,246,955

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
UCLA HEALTH SCIENCES DEPARTMENT 10945 LECONTE AVE SUITE 2339/3132 LOS ANGELES,CA 90095		PC	RESTRICTED	50,000
THE NETHERCUTT COLLECTION 15200 BLEDSOE STREET SYLMAR,CA 91342		POF	2013 DONATION UNRESTRICTED	1,000
CANYON CLUB INC 20456 LAGUNA CANYON ROAD LAGUNA BEACH,CA 92651		PC	2013 DONATION UNRESTRICTED	2,500
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO,CA 92675		PC	RESTRICTED	1,200
PLANET HOPE 4335 VAN NUYS BLVD 4335 SHERMAN OAKS,CA 91403		PC	RESTRICTED	5,000
BETTY FORD CENTER 72301 COUNTRY CLUB DRIVE RANCHO MIRAGE,CA 92270		PC	RESTRICTED	10,000
PRESIDENT & FELLOWS OF MIDDLEBURY COLLEGE COLLEGE ADVANCEMENT OLD CHAPEL 107 MIDDLEBURY,VT 05753		PC	RESTRICTED	25,000
NATIONAL STUTTERING ASSOCIATION 119 W 40TH STREET NEW YORK,NY 10018		PC	2013 DONATION UNRESTRICTED	2,500
NATIVITY PREPARATORY SCHOOL 39 LAMARTINE STREET JAMAICA PLAIN,MA 02130		PC	2013 DONATION UNRESTRICTED	2,500
GROTON SCHOOL 282 FARMERS ROW GROTON,MA 01450		PC	2013 DONATION RESTRICTED	5,000
UNIVERSITY OF CALIFORNIA - IRVINE 101 ACADEMY WAY IRVINE,CA 92617		PC	2013 DONATION - RESTRICTED	5,000
PROVIDENCE TARZANA MEDICAL CENTER 18321 CLARK STREET TARZANA,CA 91356		PC	2013 DONATION - RESTRICTED	2,500
VALPARAISO UNIVERSITY SCHOOL OF LAW 656 S GREENWICH STREET VALPARAISO,IN 46383		PC	2013 DONATION RESTRICTED	1,000
THE CHURCH AT ROCKY PEAK 22601 SANTA SUSANA PASS ROAD CHATSWORTH,CA 91311		PC	2013 DONATION RESTRICTED	1,000
CATHOLIC RELIEF SERVICES 228 WEST LEXINGTON STREET BALTIMORE,MD 21201		PC	2013 DONATION UNRESTRICTED	5,000
Total  3a				2,246,955

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CRANBROOK SCHOOL OFFICE OF ADVANCEMENT BLOOMFIELD,MI 483030801		PC	2013 DONATION UNRESTRICTED	5,000
SAINT FRANCIS CHAPEL 800 BOYLSTON STREET BOSTON,MA 02199		PC	2013 DONATION UNRESTRICTED	5,000
BREWSTER ACADEMY 80 ACADEMY DRIVE WOLFEBORO,NH 03894		PC	2013 DONATION UNRESTRICTED	5,000
ST SEBASTIAN'S SCHOOL 1191 GREENDALE AVENUE NEEDHAM,MA 02492		SOI	2013 DONATION UNRESTRICTED	25,000
ST JOSEPH'S PARISH 1382 HIGHLAND AVENUE NEEDHAM,MA 024922694		PC	2013 DONATION - UNRESTRICTED	25,000
ARCHDIOCESE OF BOSTON 66 BROOKS DRIVE BRAINTREE,MA 02184		PC	2013 DONATION - RESTRICTED	25,000
Total			3a	2,246,955

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

Schedule of Contributors

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

OMB No 1545-0047

2013

Name of the organization IACOCCA FAMILY FOUNDATION	Employer identification number 38-6071154
---	--

Organization type (check one)

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

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

General Rule

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33¹/₃% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of **(1)** \$5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for 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 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 990PF, 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 IACOCCA FAMILY FOUNDATION	Employer identification number 38-6071154
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Part I	Contributors (see instructions) Use duplicate copies of Part I if additional space is needed		
(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
<div>1</div>	<div>IACOCCA CLUT FBO ARIANNA ASSAD</div> <div>C/O WILMINGTON TRUST</div> <div>LOS ANGELES, CA 90067</div>	<div>\$ 101,138</div>	<div>Person <input checked="" type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
<div>2</div>	<div>IACOCCA CLUT FBO PARKER LEE HENTZ</div> <div>201 WASHINGTON STREET</div> <div>BOSTON, MA 02108</div>	<div>\$ 108,675</div>	<div>Person <input checked="" type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
<div>3</div>	<div>TEK CORPORATION</div> <div>450 ROBBINS DRIVE</div> <div>TROY, MI 48083</div>	<div>\$ 5,000</div>	<div>Person <input checked="" type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
<div>4</div>	<div>NATIONAL PARTS DEPOT</div> <div>900 SW 38TH AVENUE</div> <div>OCALA, FL 34474</div>	<div>\$ 10,000</div>	<div>Person <input checked="" type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
<div></div>	<div></div> <div></div> <div></div> <div></div>	<div>\$</div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>
<div></div>	<div></div> <div></div> <div></div> <div></div>	<div>\$</div>	<div>Person <input type="checkbox"/></div> <div>Payroll <input type="checkbox"/></div> <div>Noncash <input type="checkbox"/></div> <div>(Complete Part II for noncash contributions)</div>

Name of organization IACocca Family Foundation	Employer identification number 38-6071154
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Part II	Noncash Property (see instructions) Use duplicate copies of Part II if additional space is needed		
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
_____	_____ _____ _____ _____	\$ _____	_____

Name of organization IACOCCA FAMILY FOUNDATION	Employer identification number 38-6071154
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Part III	Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year. Complete columns (a) through (e) and the following line entry For organizations completing Part III, enter the total of <i>exclusively</i> religious, charitable, etc , contributions of \$1,000 or less for the year (Enter this information once See instructions) ▶ \$ Use duplicate copies of Part III if additional space is needed

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

TY 2013 Accounting Fees Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	38,866	3,887		32,804

**TY 2013 Investments Corporate
Stock Schedule**

Name: IACocca Family Foundation
EIN: 38-6071154

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PUBLICLY TRADED SECURITIES	855,051	855,051

TY 2013 Investments - Other Schedule

Name: IACocca FAMILY FOUNDATION

EIN: 38-6071154

Category / Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MUTUAL FUNDS	FMV	33,641,156	33,641,156
CASH HELD FOR INVESTMENTS	FMV	1,617,795	1,617,795
KINETA INVESTMENT LOAN	FMV	500,000	500,000

TY 2013 Land, Etc. Schedule

Name: IACocca FAMILY FOUNDATION

EIN: 38-6071154

Category / Item	Cost / Other Basis	Accumulated Depreciation	Book Value	End of Year Fair Market Value
EQUIPMENT	76,592	53,675	22,917	22,917

TY 2013 Legal Fees Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL	70,979	0		70,279

TY 2013 Other Assets Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
CSV LIFE INSURANCE POLICY	1,940,725	1,996,508	1,996,508

TY 2013 Other Expenses Schedule**Name:** IACocca FAMILY FOUNDATION**EIN:** 38-6071154

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SUPPLIES	7,675	768		6,907
TELEPHONE	9,584	958		8,626
POSTAGE, SHIPPING & DELIVERY	4,426	443		3,983
INSURANCE	42,557	4,256		38,301
OUTSIDE COMPUTER SERVICES	4,728	473		4,255
PAYROLL PROCESSING FEES	2,671	267		2,404
STORAGE	2,160	216		1,944
MISCELLANEOUS	7,974	797		7,177
BANK SERVICE CHARGES	766	77		689
MEMBERSHIP DUES	14,549	1,455		13,094

TY 2013 Other Increases Schedule

Name: IACocca Family Foundation

EIN: 38-6071154

Description	Amount
UNREALIZED GAIN	5,767,219

TY 2013 Other Professional Fees Schedule

Name: IACocca FAMILY FOUNDATION

EIN: 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER	30,987	399		30,588
INVESTMENT	43	43		0

TY 2013 Taxes Schedule**Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	22,011	2,201		19,810
EXCISE TAX	15,000	0		0