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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

Do not enter social security numbers on this form as it may be made public.  
Information about Form 990-PF and its instructions is at [www.irs.gov/form990pf](http://www.irs.gov/form990pf).

OMB No 1545-0052

2016

Open to Public Inspection

For calendar year 2016, or tax year beginning 01-01-2016, and ending 12-31-2016

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		Room/suite	
City or town, state or province, country, and ZIP or foreign postal code BOSTON, MA 02116		B Telephone number (see instructions) (617) 267-7747	
G Check all that apply <div><input type="checkbox"/> Initial return</div> <div><input type="checkbox"/> Initial return of a former public charity</div> <div><input type="checkbox"/> Final return</div> <div><input type="checkbox"/> Amended return</div> <div><input type="checkbox"/> Address change</div> <div><input type="checkbox"/> Name change</div>		D 1. Foreign organizations, check here 2. Foreign organizations meeting the 85% test, check here and attach computation	
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	
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 40,368,007		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here	
J Accounting method <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) (Part I, column (d) must be on cash basis )			

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)	1,900		
	2 Check <input checked="" type="checkbox"/> if the foundation is <b>not</b> required to attach Sch. B			
	3 Interest on savings and temporary cash investments			
	4 Dividends and interest from securities	813,473	813,473	
	5a Gross rents			
	b Net rental income or (loss)			
	6a Net gain or (loss) from sale of assets not on line 10	-176,473		
	b Gross sales price for all assets on line 6a	2,141,525		
	7 Capital gain net income (from Part IV, line 2)		0	
	8 Net short-term capital gain			
	9 Income modifications			
	10a Gross sales less returns and allowances			
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	638,900	813,473		
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	406,188	40,619	365,569
	14 Other employee salaries and wages	21,180	0	21,180
	15 Pension plans, employee benefits	242	0	242
	16a Legal fees (attach schedule)	1,760	0	1,760
	b Accounting fees (attach schedule)	13,169	1,617	11,552
	c Other professional fees (attach schedule)	27,136	506	26,630
	17 Interest			
	18 Taxes (attach schedule) (see instructions)	21,466	2,022	19,444
	19 Depreciation (attach schedule) and depletion	12,383	0	
	20 Occupancy	92,452	9,246	83,206
	21 Travel, conferences, and meetings	26,595	0	26,595
	22 Printing and publications			
	23 Other expenses (attach schedule)	137,488	8,069	75,414
	24 Total operating and administrative expenses. Add lines 13 through 23	760,059	62,079	631,592
	25 Contributions, gifts, grants paid	903,333		1,106,068
	26 Total expenses and disbursements. Add lines 24 and 25	1,663,392	62,079	1,737,660
	27 Subtract line 26 from line 12			
	a Excess of revenue over expenses and disbursements	-1,024,492		
	b Net investment income (if negative, enter -0-)		751,394	
c Adjusted net income (if negative, enter -0-)				

For Paperwork Reduction Act Notice, see instructions.

Cat No 11289X

Form 990-PF (2016)

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 . . . . .					
	2	Savings and temporary cash investments . . . . .	164,797	254,727	254,727		
	3	Accounts receivable ▶ <u>136,546</u>					
		Less allowance for doubtful accounts ▶ _____	194,503	136,546	136,546		
	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) . . . . .	1,348	7,600	7,600		
	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 . . . . .	4,155	4,416	4,416		
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule) . . . . .	1,125,140	2,293,938	2,293,938		
	c	Investments—corporate bonds (attach schedule) . . . . .					
	11	Investments—land, buildings, and equipment basis ▶ _____					
	Less accumulated depreciation (attach schedule) ▶ _____						
12	Investments—mortgage loans . . . . .						
13	Investments—other (attach schedule) . . . . .	34,732,060	35,434,177	35,434,177			
14	Land, buildings, and equipment basis ▶ <u>124,281</u>						
	Less accumulated depreciation (attach schedule) ▶ <u>51,507</u>	85,157	72,774	72,774			
15	Other assets (describe ▶ _____)	2,106,754	2,163,829	2,163,829			
16	<b>Total assets</b> (to be completed by all filers—see the instructions Also, see page 1, item I)	38,413,914	40,368,007	40,368,007			
Liabilities	17	Accounts payable and accrued expenses . . . . .	8,958	3,588			
	18	Grants payable . . . . .	1,105,000	892,265			
	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	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	1,113,958	895,853			
Net Assets or Fund Balances	<b>Foundations that follow SFAS 117, check here</b> ▶ <input checked="" type="checkbox"/> <b>and complete lines 24 through 26 and lines 30 and 31.</b>						
	24	Unrestricted . . . . .	37,299,956	39,472,154			
	25	Temporarily restricted . . . . .					
	26	Permanently restricted . . . . .					
	<b>Foundations that do not follow SFAS 117, check here</b> ▶ <input type="checkbox"/> <b>and complete lines 27 through 31.</b>						
	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	<b>Total net assets or fund balances</b> (see instructions) . . . . .	37,299,956	39,472,154			
31	<b>Total liabilities and net assets/fund balances</b> (see instructions) .	38,413,914	40,368,007				

**Part III Analysis of Changes in Net Assets or Fund Balances**

1	Total net assets or fund balances at beginning of year—Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return) . . . . .	1	37,299,956
2	Enter amount from Part I, line 27a . . . . .	2	-1,024,492
3	Other increases not included in line 2 (itemize) ▶ _____	3	3,196,690
4	Add lines 1, 2, and 3 . . . . .	4	39,472,154
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	39,472,154

**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 )
<b>1 a</b> VARIOUS SHORT TERM		2016-01-01	2016-12-31
<b>b</b> VARIOUS LONG TERM		2016-01-01	2016-12-31
<b>c</b>			
<b>d</b>			
<b>e</b>			

(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)
<b>a</b> 14,838		15,183	-345
<b>b</b> 2,126,687		2,302,815	-176,128
<b>c</b>			
<b>d</b>			
<b>e</b>			

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))
<b>a</b>			-345
<b>b</b>			-176,128
<b>c</b>			
<b>d</b>			
<b>e</b>			

<b>2</b> 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 }	<b>2</b>	-176,473
<b>3</b> 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		<b>3</b>	

**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 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))
2015	1,360,099	38,737,968	0 035110
2014	1,574,342	39,207,703	0 040154
2013	2,984,875	36,989,272	0 080696
2012	3,804,607	36,412,759	0 104486
2011	3,746,410	37,496,244	0 099914

<b>2</b> Total of line 1, column (d)	<b>2</b>	0 360360
<b>3</b> 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	<b>3</b>	0 072072
<b>4</b> Enter the net value of noncharitable-use assets for 2016 from Part X, line 5	<b>4</b>	37,806,876
<b>5</b> Multiply line 4 by line 3	<b>5</b>	2,724,817
<b>6</b> Enter 1% of net investment income (1% of Part I, line 27b)	<b>6</b>	7,514
<b>7</b> Add lines 5 and 6	<b>7</b>	2,732,331
<b>8</b> Enter qualifying distributions from Part XII, line 4	<b>8</b>	1,737,660

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 instructions)**

<b>1a</b>	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>b</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 . . . . .	<b>1</b>	15,028
<b>c</b>	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (b)		
<b>2</b>	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>2</b>	0
<b>3</b>	Add lines 1 and 2. . . . .	<b>3</b>	15,028
<b>4</b>	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	<b>4</b>	0
<b>5</b>	<b>Tax based on investment income.</b> Subtract line 4 from line 3. If zero or less, enter -0- . . . . .	<b>5</b>	15,028
<b>6</b>	Credits/Payments		
<b>a</b>	2016 estimated tax payments and 2015 overpayment credited to 2016	<b>6a</b>	50,605
<b>b</b>	Exempt foreign organizations—tax withheld at source . . . . .	<b>6b</b>	
<b>c</b>	Tax paid with application for extension of time to file (Form 8868) . . . . .	<b>6c</b>	
<b>d</b>	Backup withholding erroneously withheld . . . . .	<b>6d</b>	
<b>7</b>	Total credits and payments. Add lines 6a through 6d. . . . .	<b>7</b>	50,605
<b>8</b>	Enter any <b>penalty</b> for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	<b>8</b>	
<b>9</b>	<b>Tax due.</b> If the total of lines 5 and 8 is more than line 7, enter <b>amount owed</b> . . . . .	<b>9</b>	
<b>10</b>	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the <b>amount overpaid</b> . . . . .	<b>10</b>	35,577
<b>11</b>	Enter the amount of line 10 to be <b>Credited to 2017 estimated tax</b> <input type="checkbox"/> 35,577 <b>Refunded</b> <input type="checkbox"/>	<b>11</b>	0

**Part VII-A Statements Regarding Activities**

	Yes	No
<b>1a</b> 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? . . . . .	<b>1a</b>	No
<b>b</b> Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for definition)? . . . . . If the answer is "Yes" to <b>1a</b> or <b>1b</b> , attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities	<b>1b</b>	No
<b>c</b> Did the foundation file <b>Form 1120-POL</b> for this year? . . . . .	<b>1c</b>	No
<b>d</b> 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		
<b>e</b> Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ _____ 0		
<b>2</b> 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	<b>2</b>	No
<b>3</b> 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 . . . . .	<b>3</b>	No
<b>4a</b> Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . . . .	<b>4a</b>	No
<b>b</b> If "Yes," has it filed a tax return on <b>Form 990-T</b> for this year? . . . . .	<b>4b</b>	
<b>5</b> Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . . . If "Yes," attach the statement required by General Instruction T	<b>5</b>	No
<b>6</b> 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? . . . . .	<b>6</b>	Yes
<b>7</b> 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 . . . . .	<b>7</b>	Yes
<b>8a</b> Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> MA, MI		
<b>b</b> If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	<b>8b</b>	Yes
<b>9</b> 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 2016 or the taxable year beginning in 2016 (see instructions for Part XIV)? If "Yes," complete Part XIV . . . . .	<b>9</b>	No
<b>10</b> Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses . . . . .	<b>10</b>	No

**Part VII-A Statements Regarding Activities** (continued)

<b>11</b>	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).	<b>11</b>		<b>No</b>
<b>12</b>	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)	<b>12</b>		<b>No</b>
<b>13</b>	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address <b>IACoccaFOUNDATION.ORG</b>	<b>13</b>	<b>Yes</b>	
<b>14</b>	The books are in care of <b>THE FOUNDATION</b> Telephone no <b>(617) 267-7747</b>			

Located at **867 BOYLSTON STREET 6TH FLOOR BOSTON MA**ZIP+4 **02116**

<b>15</b>	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of <b>Form 1041</b> —Check here . . . . . <input type="checkbox"/> and enter the amount of tax-exempt interest received or accrued during the year . . . . . <b>15</b>			
<b>16</b>	At any time during calendar year 2016, 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 instructions for exceptions and filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR). If "Yes," enter the name of the foreign country <b>▶</b>	<b>16</b>	<b>Yes</b>	<b>No</b>

**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.**

<b>1a</b>	During the year did the foundation (either directly or indirectly)		<b>Yes</b>	<b>No</b>
(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 checked="" type="checkbox"/> Yes <input 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 checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
(6)	Agree to pay money or property to a government official? ( <b>Exception.</b> Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days). <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
<b>b</b>	If any answer is "Yes" to 1a(1)–(6), did <b>any</b> of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. <b>▶</b> <input type="checkbox"/>	<b>1b</b>	<b>Yes</b>	
<b>c</b>	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 2016? <input type="checkbox"/>	<b>1c</b>	<b>Yes</b>	
<b>2</b>	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))			
<b>a</b>	At the end of tax year 2016, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2016? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years <b>▶</b> 20____, 20____, 20____, 20____			
<b>b</b>	Are there any years listed in 2a for which the foundation is <b>not</b> applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to <b>all</b> years listed, answer "No" and attach statement—see instructions). <input type="checkbox"/>	<b>2b</b>		
<b>c</b>	If the provisions of section 4942(a)(2) are being applied to <b>any</b> of the years listed in 2a, list the years here <b>▶</b> 20____, 20____, 20____, 20____			
<b>3a</b>	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>b</b>	If "Yes," did it have excess business holdings in 2016 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 2016). <input type="checkbox"/>	<b>3b</b>		
<b>4a</b>	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	<b>4a</b>		<b>No</b>
<b>b</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 2016?	<b>4b</b>		<b>No</b>

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

<b>5a</b> During the year did the foundation pay or incur any amount to				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? (see instructions).	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
<b>b</b> If any answer is "Yes" to 5a(1)–(5), did <b>any</b> 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)?		<b>5b</b>	<b>Yes</b>	
Organizations relying on a current notice regarding disaster assistance check here.	<input type="checkbox"/>			
<b>c</b> If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?	<input type="checkbox"/> Yes <input type="checkbox"/> No			
If "Yes," attach the statement required by Regulations section 53.4945–5(d)				
<b>6a</b> Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
<b>b</b> Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		<b>6b</b>		<b>No</b>
If "Yes" to 6b, file Form 8870				
<b>7a</b> At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
<b>b</b> If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?		<b>7b</b>		

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

<b>1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).</b>				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
See Additional Data Table				
<b>2 Compensation of five highest-paid employees (other than those included on line 1—see instructions). If none, enter "NONE."</b>				
(a) Name and address of each employee paid more than \$50,000	Title, and average hours per week (b) devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
NONE				
<b>Total number of other employees paid over \$50,000.</b>				<b>0</b>

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

<b>3</b> 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. . . . . ▶		0

<b>Part IX-A</b> 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
<b>1</b>	
<b>2</b>	
<b>3</b>	
<b>4</b>	

<b>Part IX-B</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
<b>1</b>	
<b>2</b>	
All other program-related investments. See instructions.	
<b>3</b>	
Total. Add lines 1 through 3 . . . . . ▶	0

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

<b>1</b>	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
<b>a</b>	Average monthly fair market value of securities.	<b>1a</b>	35,656,887
<b>b</b>	Average of monthly cash balances.	<b>1b</b>	175,353
<b>c</b>	Fair market value of all other assets (see instructions).	<b>1c</b>	2,550,375
<b>d</b>	<b>Total</b> (add lines 1a, b, and c).	<b>1d</b>	38,382,615
<b>e</b>	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	<b>1e</b>	0
<b>2</b>	Acquisition indebtedness applicable to line 1 assets.	<b>2</b>	0
<b>3</b>	Subtract line 2 from line 1d.	<b>3</b>	38,382,615
<b>4</b>	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	<b>4</b>	575,739
<b>5</b>	<b>Net value of noncharitable-use assets.</b> Subtract line 4 from line 3. Enter here and on Part V, line 4.	<b>5</b>	37,806,876
<b>6</b>	<b>Minimum investment return.</b> Enter 5% of line 5.	<b>6</b>	1,890,344

**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.)

<b>1</b>	Minimum investment return from Part X, line 6.	<b>1</b>	1,890,344
<b>2a</b>	Tax on investment income for 2016 from Part VI, line 5.	<b>2a</b>	15,028
<b>b</b>	Income tax for 2016 (This does not include the tax from Part VI).	<b>2b</b>	
<b>c</b>	Add lines 2a and 2b.	<b>2c</b>	15,028
<b>3</b>	Distributable amount before adjustments. Subtract line 2c from line 1.	<b>3</b>	1,875,316
<b>4</b>	Recoveries of amounts treated as qualifying distributions.	<b>4</b>	0
<b>5</b>	Add lines 3 and 4.	<b>5</b>	1,875,316
<b>6</b>	Deduction from distributable amount (see instructions).	<b>6</b>	0
<b>7</b>	<b>Distributable amount</b> as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1.	<b>7</b>	1,875,316

**Part XII Qualifying Distributions** (see instructions)

<b>1</b>	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
<b>a</b>	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26.	<b>1a</b>	1,737,660
<b>b</b>	Program-related investments—total from Part IX-B.	<b>1b</b>	0
<b>2</b>	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes.	<b>2</b>	
<b>3</b>	Amounts set aside for specific charitable projects that satisfy the		
<b>a</b>	Suitability test (prior IRS approval required).	<b>3a</b>	
<b>b</b>	Cash distribution test (attach the required schedule).	<b>3b</b>	
<b>4</b>	<b>Qualifying distributions.</b> Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4.	<b>4</b>	1,737,660
<b>5</b>	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).	<b>5</b>	0
<b>6</b>	<b>Adjusted qualifying distributions.</b> Subtract line 5 from line 4.	<b>6</b>	1,737,660

**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 2015	(c) 2015	(d) 2016
<b>1</b> Distributable amount for 2016 from Part XI, line 7				1,875,316
<b>2</b> Undistributed income, if any, as of the end of 2016				
<b>a</b> Enter amount for 2015 only. . . . .			0	
<b>b</b> Total for prior years 20____, 20____, 20____		0		
<b>3</b> Excess distributions carryover, if any, to 2016				
<b>a</b> From 2011. . . . .	1,742,488			
<b>b</b> From 2012. . . . .	2,013,079			
<b>c</b> From 2013. . . . .	1,009,283			
<b>d</b> From 2014. . . . .				
<b>e</b> From 2015. . . . .				
<b>f</b> <b>Total</b> of lines 3a through e. . . . .	4,764,850			
<b>4</b> Qualifying distributions for 2016 from Part XII, line 4 ▶ \$ <u>1,737,660</u>				
<b>a</b> Applied to 2015, but not more than line 2a			0	
<b>b</b> Applied to undistributed income of prior years (Election required—see instructions). . . . .		0		
<b>c</b> Treated as distributions out of corpus (Election required—see instructions). . . . .	0			
<b>d</b> Applied to 2016 distributable amount. . . . .				1,737,660
<b>e</b> Remaining amount distributed out of corpus	0			
<b>5</b> Excess distributions carryover applied to 2016 (If an amount appears in column (d), the same amount must be shown in column (a) )	137,656			137,656
<b>6</b> <b>Enter the net total of each column as indicated below:</b>				
<b>a</b> Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,627,194			
<b>b</b> Prior years' undistributed income Subtract line 4b from line 2b . . . . .		0		
<b>c</b> 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		
<b>d</b> Subtract line 6c from line 6b Taxable amount—see instructions . . . . .		0		
<b>e</b> Undistributed income for 2015 Subtract line 4a from line 2a Taxable amount—see instructions . . . . .			0	
<b>f</b> Undistributed income for 2016 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2017 . . . . .				0
<b>7</b> Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions). . . . .	0			
<b>8</b> Excess distributions carryover from 2011 not applied on line 5 or line 7 (see instructions). . . . .	1,604,832			
<b>9</b> <b>Excess distributions carryover to 2017.</b> Subtract lines 7 and 8 from line 6a . . . . .	3,022,362			
<b>10</b> Analysis of line 9				
<b>a</b> Excess from 2012. . . . .	2,013,079			
<b>b</b> Excess from 2013. . . . .	1,009,283			
<b>c</b> Excess from 2014. . . . .				
<b>d</b> Excess from 2015. . . . .				
<b>e</b> Excess from 2016. . . . .				

**Part XIV Private Operating Foundations** (see instructions and Part VII-A, question 9)

<b>1a</b> If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2016, enter the date of the ruling. . . . . ▶					
<b>b</b> Check box to indicate whether the organization is a private operating foundation described in section <input type="checkbox"/> 4942(j)(3) or <input type="checkbox"/> 4942(j)(5)					
<b>2a</b> 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			<b>(e) Total</b>
	<b>(a)</b> 2016	<b>(b)</b> 2015	<b>(c)</b> 2014	<b>(d)</b> 2013	
<b>b</b> 85% of line 2a . . . . .					
<b>c</b> Qualifying distributions from Part XII, line 4 for each year listed . . . . .					
<b>d</b> Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .					
<b>e</b> Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c . . . . .					
<b>3</b> Complete 3a, b, or c for the alternative test relied upon					
<b>a</b> "Assets" alternative test—enter					
<b>(1)</b> Value of all assets . . . . .					
<b>(2)</b> Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .					
<b>b</b> "Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed. . . . .					
<b>c</b> "Support" alternative test—enter					
<b>(1)</b> Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .					
<b>(2)</b> Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii). . . . .					
<b>(3)</b> Largest amount of support from an exempt organization . . . . .					
<b>(4)</b> 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.)**

<b>1 Information Regarding Foundation Managers:</b>	
<b>a</b> 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) ) LEE A IACocca	
<b>b</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	
<b>2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:</b>	
Check here <input type="checkbox"/> 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	
<b>a</b> The name, address, and telephone number or e-mail address of the person to whom applications should be addressed KATHRYN I HENTZ 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116 (617) 267-7747	
<b>b</b> The form in which applications should be submitted and information and materials they should include GRANT APPLICATION AT WWW.IACOCFAFOUNDATION.ORG	
<b>c</b> Any submission deadlines NONE	
<b>d</b> 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)				
<b>a</b> <i>Paid during the year</i> See Additional Data Table				
<b>Total . . . . .</b> ▶ <b>3a</b>				1,106,068
<b>b</b> <i>Approved for future payment</i> See Additional Data Table				
<b>Total . . . . .</b> ▶ <b>3b</b>				892,265

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions )
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
<b>1</b> Program service revenue					
<b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>f</b> _____					
<b>g</b> Fees and contracts from government agencies					
<b>2</b> Membership dues and assessments. . . .					
<b>3</b> Interest on savings and temporary cash investments . . . . .					
<b>4</b> Dividends and interest from securities. . . .			14	813,473	
<b>5</b> Net rental income or (loss) from real estate					
<b>a</b> Debt-financed property. . . . .					
<b>b</b> Not debt-financed property. . . . .					
<b>6</b> Net rental income or (loss) from personal property					
<b>7</b> Other investment income. . . . .					
<b>8</b> Gain or (loss) from sales of assets other than inventory . . . . .			18	-176,473	
<b>9</b> Net income or (loss) from special events					
<b>10</b> Gross profit or (loss) from sales of inventory					
<b>11</b> Other revenue <b>a</b> _____					
<b>b</b> _____					
<b>c</b> _____					
<b>d</b> _____					
<b>e</b> _____					
<b>12</b> Subtotal Add columns (b), (d), and (e). .		0		637,000	0
<b>13 Total.</b> Add line 12, columns (b), (d), and (e). . . . .			<b>13</b>		637,000

(See worksheet in line 13 instructions to verify calculations )

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

[illegible]

## Part XVII

- |       | Yes | No |
|-------|-----|----|
| 1a(1) |     | No |
| 1a(2) |     | No |
| 1b(1) |     | No |
| 1b(2) |     | No |
| 1b(3) |     | No |
| 1b(4) |     | No |
| 1b(5) |     | No |
| 1b(6) |     | No |
| 1c    |     | No |

[illegible]

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

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


<b>Sign</b>	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) is based on all information of which preparer has any knowledge.

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


Phone no (508) 366-9100

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	Title, and average hours per week (b) devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	Expense account, (e) other allowances
LEE A IACocca	CHAIRMAN 1 00 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
KATHRYN I HENTZ	PRESIDENT 25 00 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116	151,258	41,680	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
LOUIS LATAIF	SECRETARY 1 00 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
KENNETH ANDERSON	TRUSTEE 1 00 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
LIA I ASSAD	TRUSTEE 1 00 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
SCOTT BLAIR	TRUSTEE 1 00 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
EDWARD BOUSA	TREASURER 1 00 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
JOHN GERACE	TRUSTEE 1 00 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
DESMOND HEATHWOOD	TRUSTEE 1 00 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
MARGARET LAURENCE	EXECUTIVE DIRECTOR 40 00 867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116	191,798	21,452	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
ACRIA 575 8TH AVENUE - SUITE 502 NEW YORK, NY 10018		PC	GRANT UNRESTRICTED	2,500
ALBERT EINSTEIN COLLEGE OF MEDICINE  DEPT OF MICROBIOLOGY IMMUNOLOGY 1300 MORRIS PARK AVENUE BRONX, NY 10461		PC	RESTRICTED GRANT	66,667
ALZHEIMER'S ASSOCIATION OF ORANGE COUNTY 2515 MCCABE WAY SUITE 200 LOS ANGELOS, CA 92614		PC	GRANT UNRESTRICTED	10,000
AMERICAN IRELAND FUND 10 POST OFFICE SQUARE SUITE 1205 BOSTON, MA 02109		PC	RESTRICTED GRANT	4,430
ANN & ROBERT H LURIE CHILDREN'S HOSPITAL  FOUNDATION - 225 E CHICAGO AVENUE BOX 4 CHICAGO, IL 60611		PC	RESTRICTED GRANT	10,000
<b>Total</b> . . . . .  <b>3a</b>				1,106,068

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
ARCHDIOCESE OF BOSTON 66 BROOKS DRIVE BRAINTREE, MA 02184		PC	RESTRICTED GRANT	5,000
BELIEVE IN SOBRIETY FOUNDATION 30025 ALICIA PARKWAY 195 LAGUNA NIGUEL, CA 92677		PC	GRANT UNRESTRICTED	1,000
BERKSHIRE HILLS MUSIC ACADEMY 48 WOODBRIDGE STREET SOUTH HADLEY, MA 01075		PC	RESTRICTED GRANT	500
BETTY FORD CENTER 72301 COUNTRY CLUB DRIVE RANCHO MIRAGE, CA 92270		PC	RESTRICTED GRANT	25,000
BOSTON COLLEGIATE 215 SYDNEY STREET DORCHESTER, MA 02125		PC	GRANT UNRESTRICTED	2,500
<b>Total . . . . .</b> 			1,106,068	
<b>3a</b>				



Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
BOSTON UNIVERSITY - QUESTROM SCHOOL OF BUSINESS  QUESTROM SCHOOL OF BUSINESS-COMMONW ALTH AVENUE BOSTON, MA 02215		PC	GRANT UNRESTRICTED	5,000
BREWSTER ACADEMY 80 ACADEMY DRIVE WOLFEBORO, NH 03894		PC	RESTRICTED GRANT	75
BRIGHAM AND WOMEN'S HOSPITAL 116 HUNTINGTON AVENUE 3RD FLOOR BOSTON, MA 02116		PC	RESTRICTED GRANT	2,500
BROADCASTERS FDN OF AMERICA 125 WEST 55TH STREET 3RD FLOOR NEW YORK, NY 100195366		PC	GRANT UNRESTRICTED	1,860
CANYON CLUB INC 20456 LAGUNA CANYON ROAD LAGUNA BEACH, CA 92651		PC	GRANT UNRESTRICTED	3,000
<b>Total . . . . . ▶</b> <b>3a</b>				1,106,068

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
CHILDREN'S HOSPITAL LOS ANGELES 4650 SUNSET BLVD - MS29 LOS ANGELOS, CA 90027		PC	GRANT UNRESTRICTED	10,000
CHOC FOUNDATION 1201 W LA VETA AVENUE ORANGE, CA 92686		PC	GRANT UNRESTRICTED	12,500
CRYSTAL COVE ALLIANCE 35 CRYSTAL COVE NEWPORT COAST, CA 92657		PC	RESTRICTED GRANT	1,000
DOVER SHERBORN EDUCATIONAL FUND PO BOX 421 DOVER, MA 02030		PC	UNRESTRICTED GRANT	250
FREEDOM INSTITUTE 515 MADISON AVE NEW YORK, NY 10022		PC	RESTRICTED GRANT	1,000
<b>Total . . . . .</b> ► <b>3a</b>				1,106,068

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
FRIENDS IN KNEAD ATTN JEAN DICKSON 3630 GEYER ROAD SUITE 100 ST LOUIS, MO 63127		PC	GRANT UNRESTRICTED	5,000
FRIENDS OF THE MACOMB COUNTY VETERANS TRE  TREATMENT COURT -16931 19 MILE ROAD SUITE 100 CLINTON TOWNSHIP, MI 48038		PC	GRANT UNRESTRICTED	2,500
FURRY ANGEL FOUNDATION 72-877 DINAH SHORE DRIVE - SUITE 103 RANCHO MIRAGE, CA 92270		PC	GRANT UNRESTRICTED	1,000
GLOBAL TEEN CHALLENGE 15 W 10TH STREET COLUMBUS, GA 31901		PC	GRANT UNRESTRICTED	5,000
HOAG HOSPITAL FOUNDATION 330 PLACENTIA AVENUE SUITE 100 NEWPORT BEACH, CA 92663		PC	RESTRICTED GRANT	25,000
<b>Total . . . . . ▶</b> <b>3a</b>				1,106,068

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
HOME FOR OUR TROOPS CALIFORNIA 6 MAIN STREET TAUNTON, MA 02780		PC	UNRESTRICTED GRANT	10,000
INSTITUTE FOR BIOLOGICAL RESEARCH SINISA STANKOVIC DEPARTMENT OF IMMUNOLOGY BELGRADE RI		PC	RESTRICTED GRANT	11,733
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO, CA 92675		PC	RESTRICTED GRANT	15,000
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO, CA 92675		PC	RESTRICTED GRANT	10,000
JSERRA CATHOLIC HIGH SCHOOL 26351 JUNIPERO SERRA RD SAN JUAN CAPISTRANO, CA 92675		PC	GRANT UNRESTRICTED	10,000
<b>Total . . . . .</b> ► <b>3a</b>				1,106,068

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
KEEP MEMORY ALIVE 888 W BONNEVILLE AVENUE LAS VEGAS, NV 89106		PC	GRANT UNRESTRICTED	15,000
LA COUNTY POLICE CANINE ASSOCIATION 1223 WILSHIRE BLVD 435 SANTA MONICA, CA 90403		PC	GRANT UNRESTRICTED	1,000
LAGUNA BEACH SENIORS 380 THIRD STREET LAGUNA BEACH, CA 92651		PC	GRANT UNRESTRICTED	1,000
LAGUNA NIGUEL MILITARY SUPPORT FOUNDATION 30111 CROWN VALLEY PARKWAY LAGUNA NIGUEL, CA 92677		PC	GRANT UNRESTRICTED	1,000
LEHIGH UNIVERSITY GLOBAL VILLAGE 111 RESEARCH DRIVE IACOCCA HALL BETHLEHEM, PA 18015		PC	RESTRICTED GRANT	21,735
<b>Total . . . . . ▶</b> <b>3a</b>				1,106,068

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
LUPUS LA 8383 WILSHIRE BLVD BEVERLY HILLS, CA 90211		PC	RESTRICTED GRANT	4,350
MAMMOTH LAKES FOUNDATION 100 COLLEGE PARKWAY MAMMOTH LAKES, CA 93546		PC	UNRESTRICTED GRANT	5,000
MASSACHUSETTS GENERAL HOSPITAL 125 NASHUA STREET SUITE 450 BOSTON, MA 02114		PC	RESTRICTED GRANT	500,000
MIRACLES FOR KIDS 3002 DOW AVENUE SUITE 126 TUSTIN, CA 92780		PC	UNRESTRICTED GRANT	5,000
MIRACLES FOR KIDS 3002 DOW AVENUE SUITE 126 TUSTIN, CA 92780		PC	RESTRICTED GRANT	9,655
<b>Total . . . . .</b> ▶ <b>3a</b>				1,106,068

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
NANTUCKET COTTAGE HOSPITAL FOUNDATION 57 PROSPECT STREET NANTUCKET, MA 025542799		PC	RESTRICTED GRANT	18,250
NATIONAL STUTTERING ASSOCIATION 119 W 40TH STREET 14TH FLOOR NEW YORK, NY 10018		PC	UNRESTRICTED GRANT	2,500
NATIVITY PREPARATORY SCHOOL 39 LAMARTINE STREET JAMAICA PLAIN, MA 02130		PC	UNRESTRICTED GRANT	2,500
PAN-MASSACHUSETTS CHALLENGE 77 4TH AVENUE NEEDHAM, MA 02494		PC	UNRESTRICTED GRANT	4,000
PEPPERDINE UNIVERSITY 24255 PACIFIC COAST HIGHWAY MALIBU, CA 902634898		PC	RESTRICTED GRANT	3,000
<b>Total . . . . . ▶</b> <b>3a</b>				1,106,068

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
PROVIDENCE TARZANA MEDICAL CENTER 18321 CLARK STREET TARZANA, CA 91356		PC	RESTRICTED GRANT	800
SAN GABRIEL JR GOLF INC PO BOX 1675 DUARTE, CA 90019		PC	UNRESTRICTED GRANT	5,000
SMALL ARMY FOR A CAUSE 300 MASSACHUSETTS AVENUE - 2ND FLOOR BOSTON, MA 02115		PC	UNRESTRICTED GRANT	2,000
ST CATHERINE OF SIENA SCHOOL 30516 SOUTH COAST HIGHWAY LAGUNA BEACH, CA 92651		PC	UNRESTRICTED GRANT	7,650
ST CATHERINE OF SIENA SCHOOL 30516 SOUTH COAST HIGHWAY LAGUNA BEACH, CA 92651		PC	RESTRICTED GRANT	10,000
<b>Total . . . . .</b> ▶ <b>3a</b>				1,106,068



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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
ST CATHERINE OF SIENA SCHOOL 30516 SOUTH COAST HIGHWAY LAGUNA BEACH, CA 92651		PC	UNRESTRICTED GRANT	10,000
ST VINCENT MEALS ON WHEELS 2303 MIRMAR STREET LOS ANGELES, CA 90057		PC	UNRESTRICTED GRANT	10,000
STRIKEOUT CROHN'S DISEASE 17400 WEDDINGTON STREET ENCINO, CA 91316		PC	UNRESTRICTED GRANT	1,500
THE BRENT SHAPIRO FOUNDATION 10250 CONSTELLATION BOULEVARD 18TH FLOOR LOS ANGELES, CA 90067		PC	UNRESTRICTED GRANT	10,000
THE CHURCH AT ROCKY PEAK 22601 SANTA SUSANA PASS ROAD CHATSWORTH, CA 91311		PC	RESTRICTED GRANT	400
<b>Total . . . . . ▶</b> <b>3a</b>				1,106,068

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Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
THE COLLEAGUES INC 515 S FIGUEROA SUITE 1050 SANTA MONICA, CA 90071		PC	GRANT UNRESTRICTED	5,000
THE FURNITURE TRUST 308 CONGRESS STREET 4TH FLOOR BOSTON, MA 02210		PC	UNRESTRICTED	1,000
THE NATURE CONSERVANCY 4245 FAIRFAX DRIVE ARLINGTON, VA 22203		PC	GRANT UNRESTRICTED	180
THE REGENTS OF THE UNIVERSITY OF CA SAN DIEGO DEPARTMENT OF PEDIATRICS- 9500 GILMAN DRIVE 0695 LA JOLLA, CA 920930695		PC	RESTRICTED GRANT	38,553
TIMEBANKS USA 5500 39TH ST NW WASHINGTON, DC 20015		PC	UNRESTRICTED GRANT	25,000
<b>Total . . . . .</b> ► <b>3a</b>				1,106,068

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Name and address (home or business)				
<b>a</b> <i>Paid during the year</i>				
UCLA HEALTH SCIENCES DEPARTMENT DIVISION OF GERIATRICS-10945 LECONTE AVE SUITE 2339/3132 LOS ANGELES, CA 90095		PC	RESTRICTED GRANT	50,000
UNIVERSITY OF CALIFORNIA - IRVINE 101 ACADEMY WAY-SUITE 120 IRVINE, CA 92617		PC	RESTRICTED GRANT	5,000
UNIVERSITY OF NC AT CHAPEL HILL MICROBIOLOGY IMMUNOLOGY-125 MASON FARM ROAD CB7290 CHAPEL HILL, NC 275997290		PC	RESTRICTED GRANT	34,180
UNIVERSITY OF SOUTHERN CALIFORNIA USC ATHLETICS HERITAGE HILL LOS ANGELES, CA 90089		PC	RESTRICTED GRANT	25,000
USA WATER POLO INC 2124 MAIN STREET SUTIE 240 HUNTINGTON BEACH, CA 92648		PC	UNRESTRICTED GRANT	10,000
<b>Total . . . . . ▶</b> <b>3a</b>				1,106,068

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
<b>a</b> Paid during the year				
VALPARAISO UNIVERSITY SCHOOL OF LAW 656 S GREENWICH STREET VALPARAISO, IN 46383		PC	RESTRICTED GRANT	800
<b>Total . . . . .</b> ▶ <b>3a</b>				1,106,068

**TY 2016 Accounting Fees Schedule****Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

<b>Category</b>	<b>Amount</b>	<b>Net Investment Income</b>	<b>Adjusted Net Income</b>	<b>Disbursements for Charitable Purposes</b>
ACCOUNTING	6,469	1,617		4,852
TAX PREPARATION FEE	2,500	0		2,500
TAX CONSULTING	4,200	0		4,200

## TY 2016 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	2,293,938	2,293,938

**TY 2016 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	35,184,177	35,184,177
KINETA INVESTMENT LOAN	FMV	250,000	250,000

**TY 2016 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	124,281	51,507	72,774	72,774



**TY 2016 Legal Fees Schedule****Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	1,760	0		1,760

## TY 2016 Other Assets Schedule

**Name:** IACOCCA FAMILY FOUNDATION

**EIN:** 38-6071154

### Other Assets Schedule

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
CSV LIFE INSURANCE POLICY	2,106,754	2,163,829	2,163,829

**TY 2016 Other Expenses Schedule****Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154**Other Expenses Schedule**

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
SUPPLIES	6,606	661		5,945
TELEPHONE	6,463	646		5,817
POSTAGE, SHIPPING & DELIVERY	1,841	184		1,657
INSURANCE	47,927	4,793		43,134
OUTSIDE COMPUTER SERVICES	2,904	290		2,614
PAYROLL PROCESSING FEES	2,771	277		2,494
STORAGE	1,779	178		1,601
MISCELLANEOUS	4,121	132		3,989
MEMBERSHIP DUES	8,125	813		7,312
PRINTING	946	95		851

Other Expenses Schedule				
Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
CANCELLED PLEDGE	54,005	0		0

**TY 2016 Other Increases Schedule**

**Name:** IACOCCA FAMILY FOUNDATION

**EIN:** 38-6071154

Description	Amount
UNREALIZED GAIN	3,196,690

**TY 2016 Other Professional Fees Schedule****Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER	4,311	431		3,880
INVESTMENT	75	75		0
SCIENTIFIC ADVISOR	22,750	0		22,750

**TY 2016 Taxes Schedule****Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	21,466	2,022		19,444