

For calendar year 2017, or tax year beginning 01-01-2017, and ending 12-31-2017

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) \$ 45,172,691		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)	1,249			
	2 Check <input checked="" type="checkbox"/> If the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	842,941	842,941		
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	1,530,264			
	b Gross sales price for all assets on line 6a	3,688,331			
	7 Capital gain net income (from Part IV, line 2)		1,530,264		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	2,374,454	2,373,205		
	13 Compensation of officers, directors, trustees, etc	442,260	44,226		344,556
	14 Other employee salaries and wages	55,933	0		55,062
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)	45,834	4,583		41,251
	b Accounting fees (attach schedule)	23,850	5,963		17,887
	c Other professional fees (attach schedule)	2,289	164		2,125
	17 Interest				
	18 Taxes (attach schedule) (see instructions)	82,826	2,883		22,235
	19 Depreciation (attach schedule) and depletion	11,601	0		
	20 Occupancy	92,140	9,214		82,926
	21 Travel, conferences, and meetings	16,210	0		16,210
	22 Printing and publications				
	23 Other expenses (attach schedule)	96,738	9,857		86,881
	24 Total operating and administrative expenses. Add lines 13 through 23	869,681	76,890		669,133
	25 Contributions, gifts, grants paid	833,851			781,950
	26 Total expenses and disbursements. Add lines 24 and 25	1,703,532	76,890		1,451,083
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	670,922			
	b Net investment income (if negative, enter -0-)		2,296,315		
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					
	2	Savings and temporary cash investments	254,727	277,932	277,932		
	3	Accounts receivable ▶ <u>136,546</u>					
		Less allowance for doubtful accounts ▶ _____	136,546	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)	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	4,416				
	10a	Investments—U S and state government obligations (attach schedule)					
	b	Investments—corporate stock (attach schedule)	2,293,938	1,080,701	1,080,701		
	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)	35,434,177	41,391,871	41,391,871			
14	Land, buildings, and equipment basis ▶ <u>124,281</u>						
	Less accumulated depreciation (attach schedule) ▶ <u>63,108</u>	72,774	61,173	61,173			
15	Other assets (describe ▶ _____)	2,163,829	2,224,468	2,224,468			
16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	40,368,007	45,172,691	45,172,691			
Liabilities	17	Accounts payable and accrued expenses	3,588	77,814			
	18	Grants payable	892,265	944,167			
	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)	895,853	1,021,981			
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	39,472,154	44,150,710			
	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 instructions)	39,472,154	44,150,710			
31	Total liabilities and net assets/fund balances (see instructions) .	40,368,007	45,172,691				

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	39,472,154
2	Enter amount from Part I, line 27a	2	670,922
3	Other increases not included in line 2 (itemize) ▶ _____	3	4,007,634
4	Add lines 1, 2, and 3	4	44,150,710
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	44,150,710

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 PUBLICLY TRADED		2017-01-01	2017-12-31
b			
c			
d			
e			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 3,688,331		2,158,067	1,530,264
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(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	
a			1,530,264
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	2	1,530,264
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 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))
2016	1,737,660	37,806,876	0 045961
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

2 Total of line 1, column (d)	2	0 306407
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 061281
4 Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	42,265,312
5 Multiply line 4 by line 3	5	2,590,061
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	22,963
7 Add lines 5 and 6	7	2,613,024
8 Enter qualifying distributions from Part XII, line 4	8	1,451,083

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)

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	45,926
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	45,926
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	45,926
6	Credits/Payments		
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	65,577
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	0
7	Total credits and payments. Add lines 6a through 6d.	7	65,577
8	Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached	8	0
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	19,651
11	Enter the amount of line 10 to be Credited to 2018 estimated tax <input type="checkbox"/> 19,651 Refunded <input type="checkbox"/>	11	0

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a	No
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 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	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? If "Yes," attach a detailed description of the activities	2	No
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes	3	No
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a	No
b If "Yes," has it filed a tax return on Form 990-T for this year?	4b	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T	5	No
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6	Yes
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> MA, MI		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2017 or the taxable year beginning in 2017 (see instructions for Part XIV)? If "Yes," complete Part XIV	9	No
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10	No

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions).	11		No
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address IACoccaFOUNDATION.ORG	13	Yes	
14	The books are in care of THE FOUNDATION Telephone no (617) 267-7747			

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

15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here <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 2017, 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 ▶	16	Yes	No

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.**

1a	During the year did the foundation (either directly or indirectly)		Yes	No
	(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 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 instructions)? <input type="checkbox"/> Organizations relying on a current notice regarding disaster assistance check here. <input type="checkbox"/>	1b	Yes	
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 2017? <input type="checkbox"/>	1c	Yes	
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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? <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). <input type="checkbox"/>	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 2017 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 2017). <input type="checkbox"/>	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 2017?	4b		No

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

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

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

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

[illegible]

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
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3 Five highest-paid independent contractors for professional services (see instructions). If none, enter "NONE".	
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[illegible]

Total number of others receiving over \$50,000 for professional services.	0
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Part IX-A	Summary of Direct Charitable Activities
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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)
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Summary of Program-Related Investments (see instructions)		Amount
Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2		
1		
2		
All other program-related investments See instructions		
3		
Total. Add lines 1 through 3		

[illegible]

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	39,846,444
b	Average of monthly cash balances.	1b	372,620
c	Fair market value of all other assets (see instructions).	1c	2,689,882
d	Total (add lines 1a, b, and c).	1d	42,908,946
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	42,908,946
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions).	4	643,634
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4.	5	42,265,312
6	Minimum investment return. Enter 5% of line 5.	6	2,113,266

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	2,113,266
2a	Tax on investment income for 2017 from Part VI, line 5.	2a	45,926
b	Income tax for 2017 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	45,926
3	Distributable amount before adjustments. Subtract line 2c from line 1.	3	2,067,340
4	Recoveries of amounts treated as qualifying distributions.	4	0
5	Add lines 3 and 4.	5	2,067,340
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	2,067,340

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	1,451,083
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	1,451,083
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	1,451,083

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 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				2,067,340
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only.			0	
b Total for prior years 20____, 20____, 20____		0		
3 Excess distributions carryover, if any, to 2017				
a From 2012.	2,013,079			
b From 2013.	1,009,283			
c From 2014.				
d From 2015.				
e From 2016.				
f Total of lines 3a through e.	3,022,362			
4 Qualifying distributions for 2017 from Part XII, line 4 ▶ \$ 1,451,083				
a Applied to 2016, 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 2017 distributable amount.				1,451,083
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a))	616,257			616,257
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	2,406,105			
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 2016 Subtract line 4a from line 2a Taxable amount—see instructions			0	
f Undistributed income for 2017 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2018				0
7 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			
8 Excess distributions carryover from 2012 not applied on line 5 or line 7 (see instructions). . . .	1,396,822			
9 Excess distributions carryover to 2018. Subtract lines 7 and 8 from line 6a	1,009,283			
10 Analysis of line 9				
a Excess from 2013.	1,009,283			
b Excess from 2014.				
c Excess from 2015.				
d Excess from 2016.				
e Excess from 2017.				

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 2017, enter the date of the ruling. ▶					
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)					
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) 2017	(b) 2016	(c) 2015	(d) 2014	
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)) LEE 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 <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	
a 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 The form in which applications should be submitted and information and materials they should include GRANT APPLICATION AT WWW.IACOCFAFOUNDATION.ORG	
c Any submission deadlines NONE	
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	781,950
b <i>Approved for future payment</i> See Additional Data Table				
Total			▶ 3b	944,167

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		
1 Program service revenue						
a _____						
b _____						
c _____						
d _____						
e _____						
f _____						
g Fees and contracts from government agencies						
2 Membership dues and assessments.						
3 Interest on savings and temporary cash investments						
4 Dividends and interest from securities.			14	842,941		
5 Net rental income or (loss) from real estate						
a Debt-financed property.						
b Not debt-financed property.						
6 Net rental income or (loss) from personal property						
7 Other investment income.						
8 Gain or (loss) from sales of assets other than inventory			18	1,530,264		
9 Net income or (loss) from special events						
10 Gross profit or (loss) from sales of inventory						
11 Other revenue a _____						
b _____						
c _____						
d _____						
e _____						
12 Subtotal Add columns (b), (d), and (e).		0		2,373,205		0
13 Total. Add line 12, columns (b), (d), and (e). (See worksheet in line 13 instructions to verify calculations)			13		2,373,205	2,373,205

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

[illegible]

Part XVII

		Yes	No
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1a(1)	No
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1a(2)	No
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1b(1)	No
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1b(2)		No
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1b(3)		No
--------------	--	-----------

1b(4)		No
--------------	--	-----------

1b(5)		No
--------------	--	-----------

1b(6)		No
--------------	--	-----------

1c		No
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value
ue

[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

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.

***** 2018-11-05 ***** May the IRS discuss this return with the preparer shown below?

* * * * *

Title

(see instr)? ☒ Yes ☐ No

Paid Preparer Use Only	Print/Type preparer's name	Preparer's Signature	Date	Check if self-employed <input type="checkbox"/>	PTIN
	THOMAS WASHBURN CPA		2018-11-05		P00537319
	Firm's name ▶ ALEXANDER ARONSON FINNING & CO PC				Firm's EIN ▶ 04-2571780
	Firm's address ▶ 50 WASHINGTON STREET WESTBOROUGH, MA 01581				Phone no (508) 366-9100

Form 990PF Part VIII Line 1 - List all officers, directors, trustees, foundation managers and their compensation				
(a) Name and address	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	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
KATHRYN I HENTZ	PRESIDENT 25 00	151,240	45,841	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
LOUIS LATAIF	SECRETARY 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				
LIA I ASSAD	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
SCOTT BLAIR	TRUSTEE 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
EDWARD BOUSA	TREASURER 1 00	0	0	0
867 BOYLSTON STREET 6TH FLOOR BOSTON, MA 02116				
JOHN GERACE	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				
MARGARET LAURENCE	EXECUTIVE DIRECTOR 40 00	214,571	30,608	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>				
ALBERT EINSTEIN COLLEGE OF MEDICINE DEPARTMENT 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 IRVINE, CA 92614		PC	GRANT UNRESTRICTED	25,000
AMERICAN RED CROSS - MA 139 MAIN STREET CAMBRIDGE, MA 02142		PC	GRANT UNRESTRICTED	5,000
Total ▶ 3a				781,950

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>				
BETTY FORD CENTER 72301 COUNTRY CLUB DRIVE RANCHO MIRAGE, CA 92270		PC	RESTRICTED GRANT	7,500
BETTY FORD CENTER 72301 COUNTRY CLUB DRIVE RANCHO MIRAGE, CA 92270		PC	UNRESTRICTED GRANT	10,000
BIG BROTHERS BIG SISTERS OF ORANGE COUNTY 1801 E EDINGER AVENUE STE 101 SANTA ANA, CA 92705		PC	GRANT UNRESTRICTED	5,000
Total ▶ 3a				781,950

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
BOSTON COLLEGIATE 215 SYDNEY STREET DORCHESTER, MA 02125		PC	GRANT UNRESTRICTED	1,000
BOSTON UNIVERSITY - QUESTROM SCHOOL OF BUSINESS 595 COMMONWEALTH AVENUE BOSTON, MA 02215		PC	GRANT UNRESTRICTED	5,000
CALIFORNIA HIGHWAY PATROL 11-99 FDN 2244 NORTH STATE COLLEGE BOULEVARD FULLERTON, CA 92831		PC	GRANT UNRESTRICTED	5,000
Total 3a				781,950

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
CANYON CLUB INC 20456 LAGUNA CANYON ROAD LAGUNA BEACH, CA 92651		PC	GRANT UNRESTRICTED	5,000
CHOC FOUNDATION 1201 W LA VETA AVENUE ORANGE, CA 92686		PC	GRANT UNRESTRICTED	12,500
CHURCH OF ST IGNATIUS OF LOYOLA CHURCH 28 COMMONWEALTH AVENUE CHESTNUT HILL, MA 02467		PC	GRANT UNRESTRICTED	25,000
Total ▶ 3a				781,950

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				
COMMUNITY FOUNDATION FOR NANTUCKET PO BOX 204 NANTUCKET, MA 02554		PC	GRANT UNRESTRICTED	1,000
CRANBROOK SCHOOLPO BOX 801 BLOOMFIELD, MI 483030801		PC	GRANT UNRESTRICTED	50,000
FREEDOM INSTITUTE515 MADISON AVE NEW YORK, NY 10022		PC	GRANT UNRESTRICTED	1,000
Total ▶ 3a				781,950

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>				
FRIENDS OF THE MACOMB COUNTY VETERANS TRE 376 WELLINGTON CRESCENT MT CLEMENS, MI 48043		PC	GRANT UNRESTRICTED	3,500
FRIENDSHIP SHELTER INCPO BOX 4252 LAGUNA BEACH, CA 92652		PC	GRANT UNRESTRICTED	1,000
GLOBAL TEEN CHALLENGE 15 W 10TH STREET COLUMBUS, GA 31901		PC	GRANT UNRESTRICTED	5,000
Total ▶ 3a				781,950

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 330 PLACENTIA AVENUE SUITE 100 NEWPORT BEACH, CA 92663		PC	RESTRICTED GRANT	36,000
INSTITUTE FOR BIOLOGICAL RESEARCH SINISA STANKOVIC BULEVAR DESPOTA STEFANA 142 BELGRADE 11060 RI		PC	RESTRICTED GRANT	25,467
JDRF NEW ENGLAND CHAPTER 60 WALNUT STREET WELLESLEY, MA 02481		PC	GRANT UNRESTRICTED	5,000
Total ▶ 3a				781,950

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>				
JOHN WAYNE CANCER FOUNDATION 210 62ND STREET NEWPORT BEACH, CA 92663		PC	GRANT UNRESTRICTED	1,000
JUNIPERO SERRA HIGH SCHOOL 14830 VAN NESS AVENUE GARDENA, CA 90249		PC	RESTRICTED GRANT	2,500
LA COUNTY POLICE CANINE ASSOCIATION 1223 WILSHIRE BLVD 435 SANTA MONICA, CA 90403		PC	GRANT UNRESTRICTED	1,000
Total ▶ 3a				781,950


Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a <i>Paid during the year</i>				
LEHIGH UNIVERSITY DEVELOPMENT GIFT PROCESSING 27 MEMORIAL DRIVE WEST BETHLEHEM, PA 18015		PC	GRANT UNRESTRICTED	10,000
LEHIGH UNIVERSITY GLOBAL VILLAGE 111 RESEARCH DRIVE IACocca HALL BETHLEHEM, PA 18015		PC	RESTRICTED GRANT	22,500
LOVE YOUR BRAIN FOUNDATION INC 109 PARK ROAD WINDSOR, VT 05089		PC	GRANT UNRESTRICTED	1,000
Total ▶ 3a				781,950

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>				
MIDDLEBURY COLLEGEOLD CHAPEL 107 MIDDLEBURY, VT 05753		PC	RESTRICTED GRANT	60,000
MIRACLES FOR KIDS 3002 DOW AVENUE SUITE 126 TUSTIN, CA 92780		PC	UNRESTRICTED GRANT	10,000
MSPCA - ANGELL 350 S HUNTINGTON AVENUE BOSTON, MA 02130		PC	RESTRICTED GRANT	5,000
Total ▶ 3a				781,950

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>				
NASHOBA LEARNING GROUP INC 10 OAK PARK DRIVE BEDFORD, MA 01730		PC	UNRESTRICTED GRANT	2,500
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
Total ▶ 3a				781,950


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>				
ORANGEWOOD FOUNDATION 1575 E 17TH STREET SANTA ANA, CA 92705		PC	UNRESTRICTED GRANT	1,000
PEPPERDINE UNIVERSITY 24255 PACIFIC COAST HIGHWAY MALIBU, CA 902634898		PC	RESTRICTED GRANT	2,000
PLANET HOPE 4335 VAN NUYS BLVD 4335 SHERMAN OAKS, CA 91403		PC	RESTRICTED GRANT	7,500
Total ▶ 3a				781,950

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>				
PLANET HOPE 4335 VAN NUYS BLVD 4335 SHERMAN OAKS, CA 91403		PC	UNRESTRICTED GRANT	10,000
PROMISES FOUNDATIONPO BOX 662087 LOS ANGELES, CA 90066		PC	UNRESTRICTED GRANT	11,000
SAN GABRIEL JR GOLF INCPO BOX 1675 DUARTE, CA 90019		PC	UNRESTRICTED GRANT	5,000
Total ▶ 3a				781,950

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 CATHERINE OF SIENA SCHOOL 30516 SOUTH COAST HIGHWAY LAGUNA BEACH, CA 92651		PC	UNRESTRICTED GRANT	15,000
ST CATHERINE OF SIENA SCHOOL 30516 SOUTH COAST HIGHWAY LAGUNA BEACH, CA 92651		PC	UNRESTRICTED GRANT	15,000
ST CATHERINE OF SIENA SCHOOL 30516 SOUTH COAST HIGHWAY LAGUNA BEACH, CA 92651		PC	UNRESTRICTED GRANT	10,000
Total 				781,950
3a				

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 JOSEPH HOSPITAL OF ORANGE 1100 WEST STEWART DRIVE ORANGE, CA 92868		PC	UNRESTRICTED GRANT	5,000
ST SEBASTIAN'S SCHOOL 1191 GREENDALE AVENUE NEEDHAM, MA 02492		PC	UNRESTRICTED GRANT	50,000
ST VINCENT MEALS ON WHEELS 2303 MIRAMAR STREET LOS ANGELES, CA 90057		PC	UNRESTRICTED GRANT	10,000
Total ▶ 3a				781,950

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>				
THE BRENT SHAPIRO FOUNDATION 10250 CONSTELLATION BOULEVARD 18TH FLOOR LOS ANGELES, CA 90067		PC	UNRESTRICTED GRANT	25,000
THE CHURCH AT ROCKY PEAK 22601 SANTA SUSANA PASS ROAD CHATSWORTH, CA 91311		PC	RESTRICTED GRANT	2,500
THE REGENTS OF THE UNIV OF CA SAN DIEGO DEPARTMENT OF PEDIATRICS- 9500 GILMAN DRIVE 0695 LA JOLLA, CA 920930695		PC	RESTRICTED GRANT	77,105
Total ▶ 3a				781,950

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 UNICAMP 11150 SANTA MONICA BOULEVARD 450 LOS ANGELES, CA 90025		PC	UNRESTRICTED GRANT	2,500
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	78,711
Total 				781,950
3a				

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>				
UNIVERSITY OF SOUTHERN CALIFORNIA 3501 WATT WAY LOS ANGELES, CA 90089		PC	RESTRICTED GRANT	27,500
VALPARAISO UNIVERSITY SCHOOL OF LAW 656 S GREENWICH STREET VALPARAISO, IN 46383		PC	RESTRICTED GRANT	500
WGBH ONE GUEST STREET BOSTON, MA 02135		PC	UNRESTRICTED GRANT	500
Total ▶ 3a				781,950

TY 2017 Accounting Fees Schedule**Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154**Accounting Fees Schedule**

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
ACCOUNTING	23,850	5,963		17,887

TY 2017 Investments Corporate Stock Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Name of Stock	End of Year Book Value	End of Year Fair Market Value
PUBLICLY TRADED SECURITIES	1,080,701	1,080,701

TY 2017 Investments - Other Schedule

Name: IACocca FAMILY FOUNDATION

EIN: 38-6071154

Investments Other Schedule 2

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MUTUAL FUNDS	FMV	41,141,871	41,141,871
KINETA INVESTMENT LOAN	FMV	250,000	250,000

**TY 2017 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	63,108	61,173	61,173

TY 2017 Legal Fees Schedule**Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
LEGAL FEES	45,834	4,583		41,251

TY 2017 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	2,163,829	2,224,468	2,224,468

TY 2017 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	5,597	560		5,037
TELEPHONE	6,359	636		5,723
POSTAGE, SHIPPING & DELIVERY	784	78		706
INSURANCE	63,591	6,359		57,232
OUTSIDE COMPUTER SERVICES	11,351	1,135		10,216
PAYROLL PROCESSING FEES	2,817	282		2,535
MISCELLANEOUS	3,739	557		3,182
MEMBERSHIP DUES	2,500	250		2,250

TY 2017 Other Increases Schedule

Name: IACOCCA FAMILY FOUNDATION

EIN: 38-6071154

Description	Amount
UNREALIZED GAIN	4,007,634

TY 2017 Other Professional Fees Schedule**Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
OTHER	139	14		125
INVESTMENT	150	150		0
SCIENTIFIC ADVISOR	2,000	0		2,000

TY 2017 Taxes Schedule**Name:** IACOCCA FAMILY FOUNDATION**EIN:** 38-6071154

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
PAYROLL TAXES	28,826	2,883		22,235
EXCISE TAXES	54,000	0		0