

Form **990-PF****Return of Private Foundation**
or Section 4947(a)(1) Trust Treated as Private Foundation

OMB No 1545-0047

2019Department of the Treasury
Internal Revenue ServiceDo not enter social security numbers on this form as it may be made public.
Go to www.irs.gov/Form990PF for instructions and the latest information

Open to Public Inspection

For calendar year 2019 or tax year beginning , 2019, and ending , 20

Name of foundation **THE PETER and JOAN SECCHIA FAMILY INC**
SECCHIA FAMILY CHARITABLE TRUST

Number and street (or P.O. box number if mail is not delivered to street address) **220 LYON NW SUITE 510**
City or town, state or province, country, and ZIP or foreign postal code **Grand Rapids, MI 49503**

A Employer identification number **38-2641093**

B Telephone number (see instructions) **(616) 235-0010**

C If exemption application is pending, check here ☐

D 1 Foreign organizations, check here ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity
☐ Final return ☐ Amended return
☐ Address change ☐ Name change

H Check type of organization ☐ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☒ Other taxable private foundation **04**

I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ **19,196,467** (Part I, column (d) must be on cash basis)

J Accounting method ☒ Cash ☐ Accrual
☐ Other (specify) _____

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
1	Contributions, gifts, grants, etc., received (attach schedule)	1,352,762			
2	Check ☐ if the foundation is not required to attach Sch. B				
3	Interest on savings and temporary cash investments				
4	Dividends and interest from securities	344,736	344,736	344,736	
5a	Gross rents				
b	Net rental income or (loss)				
6a	Net gain or (loss) from sale of assets not on line 10	1,860,824			
b	Gross sales price for all assets on line 6a	6,650,591			
7	Capital gain net income (from Part IV, line 2)		1,860,824		
8	Net short-term capital gain			1,751	
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	3,558,322	2,205,560	346,487	
13	Compensation of officers, directors, trustees, etc.				
14	Other employee salaries and wages				
15	Pension plans, employee benefits				
16a	Legal fees (attach schedule) STM107	4,935	2,467		2,468
b	Accounting fees (attach schedule) STM108	9,173	4,587		4,586
c	Other professional fees (attach schedule) STM109	93,960	93,960		
17	Interest				
18	Taxes (attach schedule) (see instructions) STM110	21,172	21,172		
19	Depreciation (attach schedule) and depletion				
20	Occupancy				
21	Travel, conferences, and meetings				
22	Printing and publications				
23	Other expenses (attach schedule) STM113	2,152			2,152
24	Total operating and administrative expenses				
	Add lines 13 through 23	131,392	122,186		9,206
25	Contributions, gifts, grants paid	5,171,581			5,171,581
26	Total expenses and disbursements. Add lines 24 and 25	5,302,973	122,186		5,180,787
27	Subtract line 26 from line 12				
a	Excess of revenue over expenses and disbursements	(1,744,651)			
b	Net investment income (if negative, enter -0-)		2,083,374		
c	Adjusted net income (if negative, enter -0-)			346,487	

For Paperwork Reduction Act Notice, see instructions

Form 990-PF (2019)

SCANNED FOR 08/08/2021

03/04

Received in NOV 06 2020
10 Batching Operation
Operating and Administrative ExpensesRECEIVED
AUG 10 2020
OGDEN, UT
RS-OSC

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	375,169	135,355	135,355
	2 Savings and temporary cash investments			
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach schedule) ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations (attach schedule)			
	b Investments - corporate stock (attach schedule) . . . STM137	12,642,809	11,409,472	18,741,160
	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)				
14 Land, buildings, and equipment basis ▶				
Less accumulated depreciation (attach schedule) ▶				
15 Other assets (describe ▶ STM120)	134,140	134,140	319,952	
16 Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)	13,152,118	11,678,967	19,196,467	
Liabilities	17 Accounts payable and accrued expenses	2,000	2,500	
	18 Grants payable	444,000	715,000	
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons . .			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	446,000	717,500	
Net Assets or Fund Balances	Foundations that follow FASB ASC 958, check here ☐			
	24 Net assets without donor restrictions			
	25 Net assets with donor restrictions			
	Foundations that do not follow FASB ASC 958, check here ☒			
	26 Capital stock, trust principal, or current funds			
	27 Paid-in or capital surplus, or land, bldg, and equipment fund			
	28 Retained earnings, accumulated income, endowment, or other funds	12,706,118	10,961,467	
	29 Total net assets or fund balances (see instructions)	12,706,118	10,961,467	
	30 Total liabilities and net assets/fund balances (see instructions)	13,152,118	11,678,967	

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 29 (must agree with end-of-year figure reported on prior year's return)	1	12,706,118
2 Enter amount from Part I, line 27a	2	(1,744,651)
3 Other increases not included in line 2 (itemize) ▶	3	
4 Add lines 1, 2, and 3	4	10,961,467
5 Decreases not included in line 2 (itemize) ▶	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 29	6	10,961,467

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (for example, 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 See STM134				
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 6,650,591		4,789,767	1,860,824	
b				
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69.				
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))	
a			1,860,824	
b				
c				
d				
e				
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	1,860,824
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	1,751

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 doesn't qualify under section 4940(e) Do not complete this part

(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))
2018	709,272	17,539,625	0.040438
2017	1,061,125	17,080,476	0.062125
2016	656,810	15,443,833	0.042529
2015	806,272	15,045,783	0.053588
2014	751,499	15,176,972	0.049516
2 Total of line 1, column (d)			2 0.248196
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5 0, or by the number of years the foundation has been in existence if less than 5 years			3 0.049639
4 Enter the net value of noncharitable-use assets for 2019 from Part X, line 5			4 18,023,803
5 Multiply line 4 by line 3			5 894,684
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 20,834
7 Add lines 5 and 6			7 915,518
8 Enter qualifying distributions from Part XII, line 4 If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate See the Part VI instructions			8 5,180,787

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b	1	20,834
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	20,834
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	20,834
6	Credits/Payments.		
a	2019 estimated tax payments and 2018 overpayment credited to 2019	6a	24,500
b	Exempt foreign organizations - tax withheld at source	6b	
c	Tax paid with application for extension of time to file (Form 8868)	6c	
d	Backup withholding erroneously withheld	6d	
7	Total credits and payments. Add lines 6a through 6d	7	24,500
8	Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	
10	Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	3,666
11	Enter the amount of line 10 to be: Credited to 2020 estimated tax 3,666 Refunded	11	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		x
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes? See the instructions for the definition If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities		x
c Did the foundation file Form 1120-POL for this year?		x
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year. (1) On the foundation. \$ _____ (2) On foundation managers. \$ _____		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. \$ _____		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		x
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		x
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		x
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		x
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	x	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV	x	
8a Enter the states to which the foundation reports or with which it is registered. See instructions MI		
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	x	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2019 or the tax year beginning in 2019? See instructions for Part XIV? If "Yes," complete Part XIV	x	
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		x

Part VII-A Statements Regarding Activities (continued)

	Yes	No
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		X
12 Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement See instructions		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	X	
Website address ▶ N/A		
14 The books are in care of ▶ Mark A Schut Telephone no ▶ 616-888-6662		
Located at ▶ 220 Lyon NW Suite 510, Grand Rapids, MI ZIP+4 ▶ 49503		
15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - check here		☐
and enter the amount of tax-exempt interest received or accrued during the year	15	
16 At any time during calendar year 2019, 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?		X
See the instructions for exceptions and filing requirements for FinCEN Form 114 If "Yes," enter the name of the foreign country ▶		

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

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

	Yes	No
1a During the year, did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance? See instructions	1b	
Organizations relying on a current notice regarding disaster assistance, check here		☐
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 2019?	1c	X
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 2019, did the foundation have any undistributed income (Part XIII, lines 6d and 6e) for tax year(s) beginning before 2019?	☐ Yes ☒ No	
If "Yes," list the years ▶		
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	2b	X
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ▶		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No	
b If "Yes," did it have excess business holdings in 2019 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 Form 4720, Schedule C, to determine if the foundation had excess business holdings in 2019.)	3b	
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2019?	4b	X

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services. See instructions. If none, enter "NONE."

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

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

Part IX-A Summary of Direct Charitable Activities

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

Expenses

1 Michigan State University - Gilbert Pavilion, Berkowitz Center and Athletic program support	3,000,000
2 Helen DeVos Childrens Hospital - Care Partners program endowment	1,000,000
3 Grand Rapids Community Legends statuary in the Grand Rapids, MI area to educate about the founders of the community	310,231
4 National Italian American Foundation - Voyage of Discovery scholarship program	100,000

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2

Amount

1	
2	
3 All other program-related investments. See instructions	

Total. Add lines 1 through 3 ▶

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	18,174,688
b	Average of monthly cash balances	1b	123,589
c	Fair market value of all other assets (see instructions)	1c	0
d	Total (add lines 1a, b, and c)	1d	18,298,277
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	
2	Acquisition indebtedness applicable to line 1 assets	2	0
3	Subtract line 2 from line 1d	3	18,298,277
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	274,474
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	18,023,803
6	Minimum investment return. Enter 5% of line 5	6	901,190

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	901,190
2a	Tax on investment income for 2019 from Part VI, line 5	2a	20,834
b	Income tax for 2019 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	20,834
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	880,356
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	880,356
6	Deduction from distributable amount (see instructions)	6	
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	880,356

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	9,206
b	Program-related investments - total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	5,171,581
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	5,180,787
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	20,834
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	5,159,953

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 2018	(c) 2018	(d) 2019
1 Distributable amount for 2019 from Part XI, line 7				880,356
2 Undistributed income, if any, as of the end of 2019				
a Enter amount for 2018 only			42,808	
b Total for prior years: _____, _____, _____				
3 Excess distributions carryover, if any, to 2019				
a From 2014				
b From 2015				
c From 2016				
d From 2017				
e From 2018				
f Total of lines 3a through e				
4 Qualifying distributions for 2019 from Part XII, line 4. ▶ \$ <u>5,180,787</u>				
a Applied to 2018, but not more than line 2a			42,808	
b Applied to undistributed income of prior years (Election required - see instructions)				
c Treated as distributions out of corpus (Election required - see instructions)				
d Applied to 2019 distributable amount				880,356
e Remaining amount distributed out of corpus	4,257,623			
5 Excess distributions carryover applied to 2019 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,257,623			
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount - see instructions				
e Undistributed income for 2018. Subtract line 4a from line 2a Taxable amount - see instructions				
f Undistributed income for 2019 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2020				
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)				
8 Excess distributions carryover from 2014 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2020. Subtract lines 7 and 8 from line 6a	4,257,623			
10 Analysis of line 9.				
a Excess from 2015				
b Excess from 2016				
c Excess from 2017				
d Excess from 2018				
e Excess from 2019	4,257,623			

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 2019, enter the date of the ruling

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

	Tax year				(e) Total
	(a) 2019	(b) 2018	(c) 2017	(d) 2016	
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	346,487	336,841	350,815		1,034,143
b 85% of line 2a	294,514	286,315	298,193		879,022
c Qualifying distributions from Part XII, line 4 for each year listed	5,180,787				5,180,787
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	5,180,787				5,180,787
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	600,793				600,793
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 foundation had \$5,000 or more in assets at any time during the year - see instructions.)

- 1 Information Regarding Foundation Managers:**
- a** List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000). (See section 507(d)(2).)
- b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.
- 2 Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**
- Check here ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc., to individuals or organizations under other conditions, complete items 2a, b, c, and d. See instructions.
- a** The name, address, and telephone number or email address of the person to whom applications should be addressed:
- b** The form in which applications should be submitted and information and materials they should include.
- c** Any submission deadlines.
- d** Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors.

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

Recipient Name and address (home or business)	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
a Paid during the year				
AHRC New York City Fndn 83 Maiden Lane 8th Flr New York, NY 10038	None	PC	Central Park Early Learning Center	1,000
American Enterprise Institute 1789 Massachusetts Ave NW Washington, DC 20036	none	PC	Leadership Program	500
American Legion Valley City Post 35 401 N Park St NW Grand Rapids, MI 49525	none	PC	Poppy days	500
Armed Forces Thanksgiving 72 Monroe Center NW Grand Rapids, MI 49503	none	PC	Event sponsor 5-3-19	2,500
Blanford Nature Center 1715 Hillburn Ave NW Grand Rapids, MI 49504	none	PC	Contribution	1,500
Broadway Grand Rapids 122 Lyon NW Grand Rapids, MI 49503	none	PC	Scholarships 2019	10,000
Catholic Charities Santa Clara Co 2625 Zanker Rd San Jose, CA 95134	none	PC	General support	7,500
Catholic Foundation of Grand rapids 360 Division Ave S Grand Rapids, MI 49503	none	PC	General Support	1,000
Total			3a	
b Approved for future payment				
Total			3b	

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

Recipient Name and address (home or business)	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
a Paid during the year				
Childrens Advocacy Center Kent Co 2855 Michiga St NE Grand Rapids, MI 49506	none	PC	Forensic Suite	25,000
City of Ferrysburg 17290Roosevelt rd. Ferrysburg, MI 49409	none	GOV	Fire barn playground equipment	25,000
CIS Michigan 721 N Capitol Ave Lansing, MI 48906	none	PC	General Support	1,000
Community Food Club 1100 Division Ave S Grand Rapids, MI 49503	none	PC	General support	1,000
Davenport University Foundation 415 East Fulton Grand Rapids, MI 49503	none	PC	O Maine College of Business	50,000
Disability Advocates of Kent Co 3600Camelot Dr SE Grand Rapids, MI 49546	none	PC	Invest in Ability	2,500
Doing Good Together 5141 16th Ave S Minneapolis, MN 55417	none	PC	General support	1,000
East Grand Rapids High School Fn 750 Lakeside Dr Grand Rapids, MI 49506	none	PC	We the people support	1,000
Total				3a
b Approved for future payment				
Total				3b

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Everybody v Parkinsons 19798 Mack Ave Grosse Pointe, MI 48236	none	PC	Research support	50,000
F Meijer Gardens 1000 East Beltline NE Grand Rapids, MI 49525	none	PC	Annals lecture series	10,000
First Steps 678 Front St Nw ste 160 Grand Rapids, MI 49504	none	PC	Early childhood learning	5,000
Friends of Grand rapids Parks PO Box 3199 Grand Rapids, MI 49501	none	PC	Earth Day 50th program	6,000
Friends of Rye Nature Center 873 Boston Post Rd Rye, NY 10580	none	PC	General support	1,000
Friends of Larchmont Library 121 Larchmont Ave Larchmont, NY 10538	none	PC	General support	1,000
G R Ford Foundation 303 Pearl St NW Grand Rapids, MI 49504	none	PC	Annual support	10,000
Girls Choral Academy 2920 Fuller Ave ste 104 Grand Rapids, MI 49505	none	PC	General support	500
Total				3a
b Approved for future payment				
Total				3b

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
Girl Scouts Heart of the Hudson 2 Great Oak Lane Pleasantville, NY 10570	none	PC	General support	1,000
Grand Rapids Community Legends 220 Lyon NW ste 510 Grand Rapids, MI 49503	none	NC	Statuary of Grand Rapids historical figures	310,231
GR Downtown Market Ed Foundation 435 Ionia SW Grand Rapids, MI 49503	none	PC	Samll plates sponsor event	15,000
Grand Rapids Comm Foundation 185 Oakes St SW Grand Rapids, MI 49503	none	PC	Annual police awards	1,000
GR Student Advancement Foundation 111 Lirary St NE Grand Rapids, MI 49503	none	PC	Mindshare	5,000
Grand Valley State University 1 Campus Dr Allendale, MI 49401	none	PC	Character and the Presidency	37,500
Helen DeVos Childrens Hospital 100 Michigan St NE Grand Rapids, MI 49503	none	PC	Care Partners program endowment	1,002,500
Izzo Legacy 5K 2299 W Grand River Okemos, MI 48864	none	PC	Event sponsor	15,000
Total			3a	
b Approved for future payment				
Total			3b	

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
JBAN 1120 Bridge St NW Grand Rapids, MI 49504	none	PC	Easter egg hunt sponsor	1,000
John Ball Zoo Society 1300 W Fulton Grand Rapids, MI 49503	none	PC	Legends of the Zoo	1,250
Juvinile Diabetes Research Foundati 5075 Cascade Rd SE Grand Rapids, MI 49546	none	PC	2019 Promise Ball	10,000
Kent County Parls Foundation PO Box 230165 Grand Rapids, MI 49523	none	PC	Somethings grilling event	10,000
Kent Garden Club 7924 Ramsdell NE Rockford, MI 49341	none	PC	Cherry tree planting project	2,950
Literacy Center of WM 1120 Monroe NW Ste 240 Grand Rapids, MI 49503	none	PC	2019 Spellabration	5,000
Mamaroneck Larchmont SEPTA 1045 Nautilus Ln Mamaroneck, NY 10543	none	PC	Murray Ave School support	2,000
Mamaroneck Schools Foundation PO Box 123 Larchmont, NY 10538	none	PC	General support	2,000
Total				3a
b Approved for future payment				
Total				3b

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

Recipient Name and address (home or business)	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
a Paid during the year				
Manhattan Institute 52 Vnaderbilt Ave New York, NY 10017	none	PC	AH awards activity	10,000
Marine Corp League PO Box 150331 Grand Rapids, MI 49515	none	PC	Alpha Co. memorial	5,000
Mary Free Bed Foundation 235 Wealth St SE Grand Rapids, MI 49503	none	PC	Mary's mission	1,000
Mel Trotter Ministries 225 Commerce SW Grand Rapids, MI 49503	none	PC	General support	2,500
Michigan Sports Alliance 171 Monroe NW Ste 510 Grand Rapids, MI 49503	none	PC	State games of Michigan	1,000
Michigan State University 426 Auditorium Rd East Lansing, MI 48824	none	PC	Building pledges	3,000,000
Michigan State University 426 Auditorium Rd East Lansing, MI 48824	none	PC	Athletic Dept support	156,000
National Italian American Found 1860 19th St NW Washington, DC 20009	none	PC	Voyage of Discovery	100,000
Total			3a	
b Approved for future payment				
Total			3b	

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

Form 990-PF (2019)

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

Recipient Name and address (home or business)	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
a Paid during the year				
Summer Search NYC 101 Howard St Ste 250 San Francisco, CA 94105	none	PC	Program support	2,000
Telluride Adaptive Sports 568 Mountain Village Blvd Telluride, CO 81435	none	PC	General support	1,000
Tri Cities Family YMCA 1 Y Dr Grand Haven, MI 49417	none	PC	General support	1,000
True Success Inc 6757 Cascade SE Grand Rapids, MI 49546	none	PC	General support	2,500
Van Andel Institute 333 Bostwick NE Grand Rapids, MI 49503	none	PC	Purple community program	2,500
West Michigan Aviation Academy 5363 44th SE Grand Rapids, MI 49512	none	PC	Leaders of Tomorrow program support	5,000
West Michigan Spartans 535 Chestnut Dr East Lansing, MI 48824	none	PC	Outstanding Junior Award program	10,000
West Michigan Sports Commission 300 Ottawwa NW Grand Rapids, MI 49503	none	PC	Wm Sports Comm annual program	12,500
Total				3a
b Approved for future payment				
Total				3b

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

Recipient Name and address (home or business)	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
a Paid during the year				
Wikimedia Foundation PO Box 98204 Washington, DC 20090	none	PC	General support	1,000
WMCAT 98 Eaqt Fulton Ste 202 Grand Rapids, MI 49503	none	PC	General support	2,000
YMCA of Grand Rapids 475 Lake Michigan Dr NW Grand Rapids, MI 49504	none	PC	Safety around Water program support	5,000
Total			3a	5,170,431
b Approved for future payment				
Total			3b	

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

- ▶ Attach to Form 990, Form 990-EZ, or Form 990-PF.
▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2019

Name of the organization

THE PETER and JOAN SECCHIA FAMILY INC

Employer identification number

38-2641093

Organization type (check one)

Filers of:

Section:

Form 990 or 990-EZ

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

Form 990-PF

- ☐ 501(c)(3) exempt private foundation
☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
☒ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule**.

Note: Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

- ☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, contributions totaling \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II. See instructions for determining a contributor's total contributions.

Special Rules

- ☐ For an organization described in section 501(c)(3) filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), that checked Schedule A (Form 990 or 990-EZ), Part II, line 13, 16a, or 16b, and that received from any one contributor, during the year, total contributions of the greater of (1) \$5,000, or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 *exclusively* for religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For an organization described in section 501(c)(7), (8), or (10) filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions *exclusively* for religious, charitable, etc., purposes, but no such contributions totaled more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Don't complete any of the parts unless the **General Rule** applies to this organization because it received *nonexclusively* religious, charitable, etc., contributions totaling \$5,000 or more during the year ▶ \$ _____

Caution: An organization that isn't covered by the General Rule and/or the Special Rules doesn't file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2, of its Form 990, or check the box on line H of its Form 990-EZ or on its Form 990-PF, Part I, line 2, to certify that it doesn't meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Name of organization

Employer identification number

THE PETER and JOAN SECCHIA FAMILY INC

38-2641093

Part I Contributors (see instructions). Use duplicate copies of Part I if additional space is needed.

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	Secchia Private Foundation NIMCRUT 220 Lyon NW Suite 510 Grand Rapids, MI 49503	\$ 1,352,762	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II for noncash contributions.)

Name of organization

Employer identification number

THE PETER and JOAN SECCHIA FAMILY INC

38-2641093

Part II **Noncash Property** (see instructions). Use duplicate copies of Part II if additional space is needed.

[illegible]

Federal Supporting Statements**2019 PG01**

Name(s) as shown on return

Tax ID Number

THE PETER and JOAN SECCHIA FAMILY INC

38-2641093

**Form 990PF - Part II - Line 15
Other Assets Schedule**

Statement #120

<u>Description</u>	<u>BOY Book</u>	<u>EOY Book</u>	<u>FMV</u>
Cash Surr Value Life Ins	134,140	134,140	319,952
Total	134,140	134,140	319,952

**Form 990PF - Part II - Line 10(b)
Investments: Corporate Stock Schedule**

PG01

Statement #137

<u>Category</u>	<u>BOY</u>	<u>Book Value</u>	<u>EOY FMV</u>
INvestment Securities	12,642,809	11,409,472	18,741,160
Totals	12,642,809	11,409,472	18,741,160

**Form 990PF - Part XII - Line 3b
Amounts That Satisfy Cash Distribution Test**

PG01

Statement #160

Cash basis qualifying charitable distributions

Federal Supporting Statements

2019 PG01

Tax ID Number

38-2641093

Name(s) as shown on return

THE PETER and JOAN SECCHIA FAMILY INC

Statement #103~

Form 990PF - Part I - Line 23 - Other Expenses Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Bank Charges	269	0	0	269
Public Relations	1,833	0	0	1,833
Filing Fees	50	0	0	50
Totals	2,152	0	0	2,152

PG01

Statement #107~

Form 990PF - Part I - Line 16(a) - Legal Fees Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Legal Fees	4,935	2,467	0	2,468
Totals	4,935	2,467	0	2,468

Federal Supporting Statements

2019 PG01

Name(s) as shown on return

THE PETER and JOAN SECCHIA FAMILY INC

Tax ID Number

38-2641093

Statement #108~

Form 990PF - Part I - Line 16(b) - Accounting Fees Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Accounting Fees	9,173	4,587	0	4,586
Totals	9,173	4,587	0	4,586

PG01

Statement #109~

Form 990PF - Part I - Line 16(c) - Other Professional Fees Schedule

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Investment Management Fees	93,960	93,960	0	0
Totals	93,960	93,960	0	0

Federal Supporting Statements

2019 PG01

Name(s) as shown on return

THE PETER and JOAN SECCHIA FAMILY INC

Tax ID Number

38-2641093

Form 990PF - Part I - Line 18 - Taxes Schedule

Statement #110~

Description	Revenue and expenses	Net investment	Adjusted net income	Charitable purpose
Income Taxes	21,172	21,172	0	0
Totals	21,172	21,172	0	0

PG01

Statement #134~

Form 990-PF - Part IV - Capital Gains And Losses Information (Overflow)

Description	P-Purchase D-Donation	Date Acquired	Date Sold	Sales Price	Depreciation	Cost or other basis	Gain or Loss	Excess or Losses
WADDELL & REED	P	VARIOUS	08-14-2019	67,927		66,675	1,252	1,252
LEGACY TRUST	P	VARIOUS	12-31-2019	663,159		690,461	(27,302)	(27,302)
LEGACY TRUST	P	VARIOUS	12-31-2019	2,260,199		1,987,888	272,311	272,311
LEGACY TRUST	P	VARIOUS	12-31-2019	12,520		19,827	(7,307)	(7,307)
FIDELITY 4640	P	VARIOUS	12-31-2019	65,716		63,835	1,881	1,881
FIDELITY 4640	P	VARIOUS	12-31-2019	1,255,473		828,173	427,300	427,300
FIDELITY 4640	P	VARIOUS	12-31-2019	277,598		193,596	84,002	84,002
FIDELITY 5618	P	VARIOUS	12-31-2019	798,917		772,942	25,975	25,975
FIDELITY 5618	P	VARIOUS	12-31-2019	354		409	(55)	(55)
RAYMOND JAMES	P	VARIOUS	12-31-2019	1,248,728		165,961	1,082,767	1,082,767
Total				6,650,591		4,789,767	1,860,824	1,860,824