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

Department of the Treasury
Internal Revenue Service

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-0052

2011

For calendar year 2011 or tax year beginning , **and ending**

Name of foundation SOKA 'PIIWA FOUNDATION	**A Employer identification number** 83-0321664
Number and street (or P O box number if mail is not delivered to street address) P.O. BOX 6769 — Room/suite	**B** Telephone number (307) 674-0848
City or town, state, and ZIP code SHERIDAN, WY 82801	**C** If exemption application is pending, check here ▶ ☐
G Check all that apply: ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change	**D** 1. Foreign organizations, check here ▶ ☐ 2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐
H Check type of organization: [X] Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation	**E** If private foundation status was terminated under section 507(b)(1)(A), check here ▶ ☐
I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶$ 2,066,313. **J** Accounting method: [X] Cash ☐ Accrual ☐ Other (specify) *(Part I, column (d) must be on cash basis.)*	**F** If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ▶ ☐

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))

		(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				
	2 Check ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	84,158.	84,158.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	<95,314.>			
	b Gross sales price for all assets on line 6a 2,296,763.				
	7 Capital gain net income (from Part IV, line 2)		0.		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss)				
	11 Other income				
	12 **Total.** Add lines 1 through 11	<11,156.>	84,158.	0.	
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees				
	b Accounting fees STMT 2	4,520.	2,260.	0.	2,260.
	c Other professional fees				
	17 Interest				
	18 Taxes STMT 3	5,248.	1,505.	0.	0.
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 4	11,865.	11,865.	0.	0.
	24 **Total operating and administrative expenses** Add lines 13 through 23	21,633.	15,630.	0.	2,260.
	25 Contributions, gifts, grants paid	24,000.			24,000.
	26 **Total expenses and disbursements.** Add lines 24 and 25	45,633.	15,630.	0.	26,260.
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	<56,789.>			
	b **Net investment income** (if negative, enter -0-)		68,528.		
	c **Adjusted net income** (if negative, enter -0-)			0.	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only

		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	110,245.	74,427.	74,427.
	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			
	7 Other notes and loans receivable ▶			
	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			
	b Investments - corporate stock STMT 5	1,494,499.	1,649,411.	1,061,551.
	c Investments - corporate bonds STMT 6	1,224,466.	848,583.	747,205.
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 7	0.	200,000.	183,130.
	14 Land, buildings, and equipment: basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers)	2,829,210.	2,772,421.	2,066,313.
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ [X] and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	2,829,210.	2,772,421.	
	28 Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29 Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30 **Total net assets or fund balances**	2,829,210.	2,772,421.	
	31 **Total liabilities and net assets/fund balances**	2,829,210.	2,772,421.	

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	2,829,210.
2	Enter amount from Part I, line 27a	2	<56,789.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2,772,421.
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	2,772,421.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	SEE ATTACHED STATEMENT	P	VARIOUS	VARIOUS
b	SEE ATTACHED STATEMENT	P	VARIOUS	VARIOUS
c	WACHOVIA	P	VARIOUS	VARIOUS
d	BANK OF AMERICA	P	VARIOUS	VARIOUS
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	1,840,414.		1,953,559.	<113,145.>
b	455,109.		438,518.	16,591.
c	740.			740.
d	500.			500.
e				

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				<113,145.>
b				16,591.
c				740.
d				500.
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	<95,314.>
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). If (loss), enter -0- in Part I, line 8	3	N/A

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))
2010	64,390.	2,200,170.	.029266
2009	44,275.	1,699,177.	.026057
2008	152,559.	2,323,711.	.065653
2007	281,177.	3,067,640.	.091659
2006	122,546.	2,738,826.	.044744

2	**Total** of line 1, column (d)	2	.257379
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	.051476
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	2,309,743.
5	Multiply line 4 by line 3	5	118,896.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	685.
7	Add lines 5 and 6	7	119,581.
8	Enter qualifying distributions from Part XII, line 4	8	26,260.

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 ▶ ☐ 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	1,371.
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	1,371.
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	1,371.
6 Credits/Payments:				
a 2011 estimated tax payments and 2010 overpayment credited to 2011	6a	2,600.		
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	2,600.
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	1,229.
11 Enter the amount of line 10 to be: **Credited to 2012 estimated tax** ▶ 1,229. **Refunded** ▶			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		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	1b		X
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			
c Did the foundation file **Form 1120-POL** for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ▶ $ 0. (2) On foundation managers. ▶ $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 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		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*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If "Yes," has it filed a tax return on **Form 990-T** for this year? N/A	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		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?	6	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*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ WY			
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	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 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		X

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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)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ N/A

14 The books are in care of ▶ KAREN KOYAMA-BREEN Telephone no ▶ (307)674-0848

Located at ▶ P.O. BOX 6769, SHERIDAN, WY ZIP+4 ▶ 82801

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 N/A

			Yes	No
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country ▶			

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

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

				Yes	No
1a	During the year did the foundation (either directly or indirectly):				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ 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)?	N/A	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 2011?		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 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011?	☐ 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.)	N/A	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. ▶ ____, ____, ____, ____				
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 2011 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 2011)*	N/A	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 2011?		4b		X

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

			Yes	No
5a During the year did the foundation pay or incur any amount to:				
(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ Yes ☒ No			
(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive?	☐ Yes ☒ No			
(3) Provide a grant to an individual for travel, study, or other similar purposes?	☐ Yes ☒ No			
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?	☐ Yes ☒ No			
(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?	☐ Yes ☒ No			
b If any answer is "Yes" to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)?	N/A	5b		
Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A	☐ Yes ☐ No			
If "Yes," attach the statement required by Regulations section 53.4945-5(d)				
6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?	☐ Yes ☒ No			
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		6b		X
If "Yes" to 6b, file Form 8870.				
7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?	☐ Yes ☒ No			
b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?	N/A	7b		

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
GEORGE D. WIDENER P.O. BOX 2565 COLUMBIA FALLS, MT 59912	TRUSTEE 0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). 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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Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

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

Total number of others receiving over $50,000 for professional services ▶ 0

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 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	2,201,249.
b	Average of monthly cash balances	1b	143,668.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	2,344,917.
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	2,344,917.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	35,174.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,309,743.
6	**Minimum investment return** Enter 5% of line 5	6	115,487.

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	115,487.
2a	Tax on investment income for 2011 from Part VI, line 5 — 2a: 1,371.		
b	Income tax for 2011. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	1,371.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	114,116.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	114,116.
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	114,116.

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	26,260.
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	26,260.
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	5	0.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	26,260.

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.

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Part XIII **Undistributed Income** (see instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				114,116.
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only			16,677.	
b Total for prior years: _____, _____, _____		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006				
b From 2007				
c From 2008				
d From 2009				
e From 2010				
f **Total** of lines 3a through e	0.			
4 Qualifying distributions for 2011 from Part XII, line 4: ▶ $ 26,260.				
a Applied to 2010, but not more than line 2a			16,677.	
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 2011 distributable amount				9,583.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	0.			
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 2010. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2011. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012				104,533.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2006 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2012** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2007				
b Excess from 2008				
c Excess from 2009				
d Excess from 2010				
e Excess from 2011				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, 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	Prior 3 years			
	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
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 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).)

NONE

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.

NONE

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

Check here ▶ ☒ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number 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*				
SEE STATEMENT 9				24,000.
Total			▶ 3a	24,000.
b *Approved for future payment*				
NONE				
Total			▶ 3b	0.

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Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income (a) Business code	(b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	(d) Amount	(e) Related or exempt function income
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	84,158.	
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	<95,314.>	
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.		<11,156.>	0.

13 **Total**. Add line 12, columns (b), (d), and (e) 13 <11,156.>

(See worksheet in line 13 instructions to verify calculations.)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes).
	N/A

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

			Yes	No
1	Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?			
a	Transfers from the reporting foundation to a noncharitable exempt organization of:			
	(1) Cash	1a(1)		X
	(2) Other assets	1a(2)		X
b	Other transactions:			
	(1) Sales of assets to a noncharitable exempt organization	1b(1)		X
	(2) Purchases of assets from a noncharitable exempt organization	1b(2)		X
	(3) Rental of facilities, equipment, or other assets	1b(3)		X
	(4) Reimbursement arrangements	1b(4)		X
	(5) Loans or loan guarantees	1b(5)		X
	(6) Performance of services or membership or fundraising solicitations	1b(6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		X

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

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

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
N/A		

Sign Here

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

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

▶ Georges Wisdener | 8/14/12 | ▶ TRUSTEE

Signature of officer or trustee | Date | Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
BRIAN FLEMING	[signature]	8/13/12		P00448170

Firm's name ▶ DELOITTE TAX LLP — Firm's EIN ▶ 86-1065772

Firm's address ▶ 555 17TH STREET, SUITE 3600 DENVER, CO 80202 — Phone no. 303-312-5400

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12-02-11

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
MORGAN STANLEY	84,158.	0.	84,158.
TOTAL TO FM 990-PF, PART I, LN 4	84,158.	0.	84,158.

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,520.	2,260.	0.	2,260.
TO FORM 990-PF, PG 1, LN 16B	4,520.	2,260.	0.	2,260.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX WITHHELD	1,505.	1,505.	0.	0.
FEDERAL	3,743.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	5,248.	1,505.	0.	0.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MANAGEMENT FEE	11,865.	11,865.	0.	0.
TO FORM 990-PF, PG 1, LN 23	11,865.	11,865.	0.	0.

FORM 990-PF CORPORATE STOCK STATEMENT 5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT 8	1,649,411.	1,061,551.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,649,411.	1,061,551.

FORM 990-PF CORPORATE BONDS STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT 8	848,583.	747,205.
TOTAL TO FORM 990-PF, PART II, LINE 10C	848,583.	747,205.

FORM 990-PF OTHER INVESTMENTS STATEMENT 7

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CERTIFICATE OF DEPOSIT	COST	200,000.	183,130.
TOTAL TO FORM 990-PF, PART II, LINE 13		200,000.	183,130.

Soka'pnwa Foundation
December 31, 2011

Stocks	Book Value	Fair Market Value
Accenture Plc Ireland	$7,118 66	$6,334 37
Activision Blizzard Inc	$2,803 67	$2,574 88
Altria Group Inc	$18,538 26	$20,250 95
Amer Financial Gp	$2,817 47	$2,877 42
Apple Inc	$3,475 25	$6 885 00
Assurant Inc	$18,078 59	$18 846 54
AT&T Inc	$22 042 09	$19,111 68
Atrion Corp	$2 756 84	$2,882 76
Autozone Inc	$9,887 43	$9,749 10
Bank of America Corp	$185,751 62	$97,300 00
Big Lots Inc Ohio	$18,155 51	$18,389 12
Bristol Myers Squibb Co	$5,884 56	$7,647 08
Cardtronics Inc	$2,843 41	$3 111 90
Centerpoint Energy Inc	$7,081 23	$6 710 06
Chubb Corp	$7 086 96	$7,060 44
Citigroup Inc	$420 853 25	$66,301 20
Comtech Telecommunications New	$2,812 88	$2,404 08
Cons Edison Inc	$7,076 89	$7,381 57
Cree Research Inc	$49,942 16	$38,107 16
CVR Energy Inc	$2,835 74	$2,116 49
Dollar Tree Inc	$9,880 63	$10 388 75
Domtar Corp	$2,812 84	$2 798 60
Donnelley R R & Sons Co	$21,954 17	$22,106 76
DukeEnergyHldg	$7 088 99	$7,590 00
Exxon Mobil Corp	$18 439 53	$19,240 52
Fastenal Co	$7,114 69	$8,373 12
Gabelli Nat Res	$100,000 00	$67,200 00
Gamestop Corp	$2,812 68	$2,678 43
Gap Inc	$18,315 08	$17,937 85
General Electric Co	$213,580 74	$107 460 00
Genuine Parts Co	$7,096 89	$7 405 20
Hewlett Packard	$18 233 13	$17 671 36
Home Depot Inc	$15 497 66	$20,683 68
IAC Interactive Corp	$2,795 60	$2,896 80
Intel Corp	$14 723 25	$17,920 75
International Business Machines	$14,091 31	$18,388 00
JPMorgan Chase & Co	$18,208 29	$16,891 00
Kohl's Corp	$18,245 48	$16 976 40
Laclede Group Inc New	$2,879 65	$2 832 90
Lockheed Martin Corp	$17 250 15	$19,416 00
Lowes Companies Inc	$18,262 85	$21,166 92
Magellan Health Services Inc	$2,755 19	$2,572 44
Manhattan Assoc Inc	$2,797 27	$2,752 64
Marsh & Mclennan Cos Inc	$7,079 72	$7,146 12
O'Reilly Automotive	$9 897 14	$10,553 40
Penney J C Co	$18,355 89	$19,437 95
Pfizer Incorporated	$16,548 00	$20 319 96
Philip Morris Intl Inc	$4,928 67	$7 848 00
Precision Castparts Corp	$6 963 73	$6,591 60
Ralph Lauren Corp	$7 073 15	$6,213 60
Ross Stores Inc	$7 075 99	$7,699 86
Sunoco Inc	$54,992 00	$57,428 00
Tech Data Corp	$2,405 35	$2,717 55
Tel & Data Systems Inc Del	$2,820 07	$3,055 02
TJX Cos Inc New	$7,007 78	$7,616 90
Torchmark Corp	$18,531 71	$19 308 55
Travelers Companies	$16 231 79	$18,638 55
Tyler Technologies Inc	$2 835 41	$2,740 01
URS Corp New	$2,831 77	$2,739 36
US Steel	$78,710 00	$44,982 00
Usana Health Sciences	$2,789 60	$2,520 71
Verizon Communications	$5,084 44	$7,662 92
Visa Inc	$7,176 82	$7 817 81
Wal-Mart Stores Inc	$17,393 74	$19 123 20
Total Stocks	$1,649 411 31	$1,061,550 99

Corporate Bonds	Book Value	Fair Market Value
BAC Capital Tr XIV	$142,878 00	$120,500 00
Bank of America Step-up Notes	$100,000 00	$80,892 00
BBVA Intl Pref	$86,756 00	$66,203 00
Nationwide Finl Svcs	$97,926 00	$86,500 00
PNC Financial Services	$101,872 00	$97 793 00
US West Capital Funding	$92,655 00	$93 897 00
Wachovia Captl Trust	$93 336 00	$83,750 00
Bank of America	$43 048 46	$43,390 00
Schlumberger Ltd	$90 111 92	$74,280 00
Total Corporate Bonds	$848,583 38	$747,205 00

Schedule D
Soka'piiwa Foundation
2011

Capital Gains and Losses
83-0321664

Part I Short-Term Capital Gains and Losses
- Assets Held 1 Year or Less

(a) Description of Property	(b) Date(s) acquired	(c) Date Sold	(d) Sales Price	(e) Cost Basis	(f) Gain (Loss)
$100,000 Trans-Canada Pipelns	4/19/2010	1/19/2011	98,794 00	98,006 00	788 00
$100,000 Mellon Capital IV	9/28/2010	1/19/2011	91,494 00	94,006 00	(2,512 00)
$200,000 Wachovia Captl Trust	6/28/2010	2/7/2011	175,300 00	162,000 00	13,300 00
$125,000 Suntrust Pfd Cap I	12/9/2010	2/23/2011	95,306 50	97,349 75	(2,043 25)
$100,000 Everest Reins Hldgs	10/13/2010	2/24/2011	95,744 00	94,006 00	1,738 00
$100,000 Rev Cvt on Chesapeake	3/16/2010	2/25/2011	100,000 00	89,452 77	10,547 23
$100,000 Lincoln Natl Corp Ind	8/12/2010	3/11/2011	97,994 00	92,000 00	5,994 00
$50,000 Lincoln Natl Corp Ind	8/12/2010	3/18/2011	48,744 00	46,000 00	2,744 00
$150,000 BAC Capital Tr XIV	4/30/10,6/3/10	3/24/2011	112,500 00	111,384 00	1,116 00
4,000 shares of Fleet Cap T VIII	7/30/2010	4/4/2011	99,141 28	98,996 00	145 28
$200,000 XL Capital Ltd Fixed	2/24/2011	5/19/2011	189,250 00	189,600 00	(350 00)
$150,000 Huntington Cap III	2/7/2011	5/24/2011	147,750 00	146,812 50	937 50
Rev Cvt Exchange for 1,700 shares of US Steel	1/30/2011	7/1/2011	79,638 00	90,972 43	(11,334 43)
136 shares of Akamai Technologies Inc	10/25/2010	7/29/2011	3,311 18	6,590 25	(3,279 07)
238 shares of US Airways Group Inc	10/25/2010	8/3/2011	1,417 12	2,673 50	(1,256 38)
2,000 shares of Fifth Third Cap Trust	8/19/2011	8/19/2011	49,404 81	46,329 96	3,074 85
Rev Cvt Exchange for 1,729 shares of Cree Research	3/28/2011	8/26/2011	51,149 74	82,998 60	(31,848 86)
Rev Cvt on Exchange for 7,500 shares of Bank of America	11/30/2010	10/3/2011	44,218 00	88,766 50	(44,548 50)
104 shares of Complete Prod Serv Inc	10/25/2010	10/12/2011	2,953 55	2,671 34	282 21
360 shares of Raytheon Co (New)	10/25/2010	10/25/2011	15,946 07	17,150 36	(1,204 29)
105 shares of Agnum Inc	10/25/2010	10/25/2011	8,234 03	9,256 40	(1,022 37)
70 shares of Cummins Inc	10/25/2010	10/25/2011	6,508 05	6,675 31	(167 26)
65 shares of F5 Networks Inc	10/25/2010	10/25/2011	5,900 01	6,599 09	(699 08)
56 shares of Franklin Resources Inc	10/25/2010	10/25/2011	5,720 75	6,510 28	(789 53)
146 shares of Magna Intl Inc	10/25/2010	10/25/2011	5,475 44	6,567 36	(1,091 92)
127 shares of NetApp Inc Com	10/25/2010	10/25/2011	4,912 32	6,625 42	(1,713 10)
55 shares of Netflix Inc	10/25/2010	10/25/2011	4,194 86	9,122 83	(4,927 97)
32 shares of Green Mountain Coffee Inc	7/29/2011	10/25/2011	2,239 06	3,297 74	(1,058 68)
249 shares of Genl Communications	10/25/2010	10/25/2011	2,193 79	2,687 46	(493 67)
131 shares of Georgia Gulf Corporation New	10/25/2010	10/25/2011	2,191 74	2,664 36	(472 62)
70 shares of Endo Pharmaceuticals Hlds Inc	10/25/2010	10/25/2011	1,996 84	2,622 75	(625 91)
183 shares of Chiquita Brands Int New	10/25/2010	10/25/2011	1,575 13	2,660 77	(1,085 64)
223 shares of Colgate Palmolive Co	10/25/2010	10/27/2011	20 264 65	17,169 48	3,095 17
97 shares of Kelly Svcs A	8/3/2011	10/27/2011	1,589 30	1,422 25	167 05
$100,000 BB&T Capital Tr IV	1/21/2011	11/29/2011	99,494 00	101,000 00	(1,506 00)
506 shares of Novellus System	10/27/2011	12/15/2011	20,369 69	18,593 63	1,776 06
$100,00 Genworth Financial Rev Cvt	2/28/2011	12/23/2011	47,498 17	92,317 98	(44,819 81)
Totals			**1,840,414.08**	**1,953,559.07**	**(113,144.99)**

Schedule D
Soka'piiwa Foundation
2011

Capital Gains and Losses
83-0321664

Part II Long-Term Capital Gains and Losses
- Assets Held More than 1 Year

(a) Description of Property	(b) Date(s) acquired	(c) Date Sold	(d) Sales Price	(e) Cost Basis	(f) Gain (Loss)
$100,000 MS Cpn on Fx Basket	9/23/2009	1/14/2011	101,925 00	100,000 00	1,925 00
2,000 shares of Valero Energy Cp	3/31/2009	4/29/2011	55,994 92	92,337 00	(36,342 08)
Merrill Lynch & Co Sec Litigation	6/22/2006	9/14/2011	135 47	0 00	135 47
Bank of American SEC Fair Fund	7/2/03,10/14/03,6/10/08	9/20/2011	70 28	0 00	70 28
136 shares of Freeport McMoran CP&Gld	10/23/2009	10/25/2011	5,280 10	5,701 40	(421 30)
201 shares of Chevron Corp	5/30/7,9/5/07,10/21/08,10/23/09	10/27/2011	21,825 43	16,271 47	5,553 96
391 shares of Automatic Data Processing Inc	10/23/09,10/25/10	10/27/2011	20,420 47	16,021 34	4,399 13
217 shares of McDonalds Corp	5/30/07,9/5/07,10/21/08	10/27/2011	20,040 93	10,952 30	9,088 63
280 shares of Coca Cola Co	10/23/2009	10/27/2011	19,149 28	15,020 35	4,128 93
679 shares of Microsoft Corp	10/25/2010	10/27/2011	18,271 19	17,182 10	1,089 09
270 shares of Procter & Gamble	10/23/09,10/25/10	10/27/2011	17,616 32	15,565 26	2,051 06
325 shares of Abbott Laboratories	5/30/07,9/5/07,6/10/08,10/23/09,10/25/10	10/27/2011	17,485 64	17,080 43	405 21
268 shares of Johnson & Johnson	5/30/06 5/30/07,9/5/07 6/10/08 10/23/09 10/25/10	10/27/2011	17,475 78	16,391 34	1,084 44
315 shares of Total Fina Elf SA5/30/06,9/5/07,10/21/08,10/25/10		10/27/2011	17,357 17	19,219 05	(1,861 88)
342 shares of Verizon Communications	10/21/2008	10/27/2011	12,738 63	8,988 73	3,749 90
234 shares of Las Vegas Sands Corp	10/25/2010	10/27/2011	10,410 16	9,267 55	1,142 61
18 shares of Priceline com Inc New	10/25/2010	10/27/2011	9,284 40	6,685 27	2,599 13
227 shares of Oracle Corp	10/25/2010	10/27/2011	7,517 95	6,619 25	898 70
99 shares of Edward Lifesciences Corp	10/25/2010	10/27/2011	7,389 08	6,601 89	787 19
109 shares of Newmont Mining Corp (new)	10/25/2010	10/27/2011	7,207 99	6,578 36	629 63
228 shares of Texas Instruments	10/25/2010	10/27/2011	7,152 95	6,645 97	506 98
139 shares of Du Pont EI De Nemours & Co	10/23/2009	10/27/2011	6,681 06	4,702 49	1,978 57
11 shares of Google Inc	10/21/2008	10/27/2011	6,559 34	4,004 97	2,554 37
22 shares if Intl Business Machines Corp	10/25/2010	10/27/2011	4,075 17	3,100 09	975 08
139 shares of Tibco Software Inc	10/25/2010	10/27/2011	3,912 26	2,694 36	1,217 90
97 shares of World Fuel Services Corp	10/23/09,10/25/10	10/27/2011	3,906 76	2,551 52	1,355 24
160 shares of Medicines Co (The)	10/25/2010	10/27/2011	3,620 25	2,634 26	985 99
321 shares of Atmel Corp	10/25/2010	10/27/2011	3,599 27	2,658 84	940 43
142 shares of United Rentals Inc	10/25/2010	10/27/2011	3,482 51	2,686 00	796 51
177 shares of Asbury Automotive Group Inc	10/25/2010	10/27/2011	3,465 20	2,656 24	808 96
168 shares of RPC Inc	10/25/2010	10/27/2011	3,044 15	2,612 83	431 32
122 shares of Intel Corp	10/25/2010	10/27/2011	3,038 50	2,430 63	607 87
470 shares of CNO Finl Group Inc Com	10/25/2010	10/27/2011	2,964 94	2,641 07	323 87
68 shares of Wgl Hldgs Inc (hldg Co)	10/25/2010	10/27/2011	2,917 59	2,644 81	272 78
93 shares of Owens & Minor Inc	10/25/2010	10/27/2011	2,747 08	2,645 48	101 60
52 shares of Home Depot Inc	10/25/2010	10/27/2011	1,919 78	1,637 96	281 82
4 shares of Apple Inc	10/23/2009	10/27/2011	1,611 60	817 70	793 90
13 shares of Philip Morris Intl Inc	10/23/2009	10/27/2011	925 10	640 73	284 37
27 shares of Bristol Myers Squibb Co	10/25/2010	10/27/2011	877 82	732 18	145 64
36 shares of Pfizer Inc	10/25/2010	10/27/2011	704 37	634 43	69 94
6 shares of Tech Data Corp	10/25/2010	10/27/2011	306 66	262 40	44 26
Totals			**$455,108 55**	**$438,518.05**	**16,590 50**

Soka'piiwa Foundation
2011 Donations

Recipient	Address	Relationship To Soka'piiwa	Purpose	Status	Amount
Intercollegiate Equestrian Foundation	311 Parker Slatton Road Simpsonville, SC 29681	None	To foster & promote intercollegiate equestrian activities and competitions	501(c)(3)	$1,500 00
Montana Trout Unlimited	PO Box 7189 Missoula, MT 59807	None	Conservation & restoration of Montana's coldwater fisheries & their watersheds	501(c)(3)	$1,000 00
Montana Wilderness Association	30 South Ewing Helena, MT 59601	None	Protect Montana's wilderness heritage, quiet beauty, and outdoor traditions	501(c)(3)	$2,500.00
National Resources Defense Council	PO Box 70 Livingston, MT 59047	None	Defend wilderness & wildlife, protect clean air & water and a healthy environment.	501(c)(3)	$4,000 00
Neighbors Helping Neighbors	PO Box 303 Choteau, MT 59422	None	Helping low-income people connect to resources in Teton County, Montana	501(c)(3)	$1,000 00
Old Trail Museum	PO Box 919 Choteau, MT 59422	None	Museum reflects the rich natural and cultural history of Montana's pristine Rocky Mountain Front region	501(c)(3)	$3,500.00
Reining Horse Sports Foundation	3000 NW 10th Street Oklahoma City, OK 73107-5302	None	Dale Wilkerson Memorial Crisis Fund	501(c)(3)	$1,000 00
Rocky Mountain Front Weed Roundtable	PO Box 663 Choteau, MT 59422	None	Cooperative Weed Management	501(c)(3)	$1,000 00
Ronald McDonald House	One Kroc Drive Oak Brrok, IL 60523	None	Home-away-from-home for families	501(c)(3)	$2,500 00
South Eastern Reining Horse Association	463 Cotton Gin Rd Gates, NC 27937	None	Horse Riding in North Carolina	501(c)(3)	$3,000 00
Teton Medical Center	915 Fourth St NW Choteau, MT 59422	None	Medical Care Services	501(c)(3)	$1,500 00
University of Montana Foundation	PO Box 7159 Missoula, MT 59807-7159	None	University of Montana Education	501(c)(3)	$1,500 00
			Total Contributions Paid		**$24,000.00**

Form **8868**
(Rev January 2012)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

▶ **File a separate application for each return.**

OMB No. 1545-1709

- If you are filing for an **Automatic 3-Month Extension, complete only Part I** and check this box ▶ [X]
- If you are filing for an **Additional (Not Automatic) 3-Month Extension, complete only Part II** (on page 2 of this form)

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868

Electronic filing *(e-file)*. You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions) For more details on the electronic filing of this form, visit *www irs gov/efile* and click on *e-file for Charities & Nonprofits*

Part I **Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete Part I only ▶ [ ]

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns

Type or print		
	Name of exempt organization or other filer, see instructions. SOKA 'PIIWA FOUNDATION	Employer identification number (EIN) or [X] 83-0321664
File by the due date for filing your return See instructions	Number, street, and room or suite no. If a P.O. box, see instructions P.O. BOX 6769	Social security number (SSN) [ ]
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SHERIDAN, WY 82801	

Enter the Return code for the return that this application is for (file a separate application for each return) 0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	01	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ▶ KAREN KOYAMA-BREEN
P.O. BOX 6769, SHERIDAN, WY - 82801
Telephone No ▶ (307)674-0848 FAX No ▶
- If the organization does not have an office or place of business in the United States, check this box ▶ [ ]
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) ______ . If this is for the whole group, check this box ▶ [ ] . If it is for part of the group, check this box ▶ [ ] and attach a list with the names and EINs of all members the extension is for

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until AUGUST 15, 2012 , to file the exempt organization return for the organization named above. The extension is for the organization's return for:
▶ [X] calendar year 2011 or
▶ [ ] tax year beginning ______ , and ending ______

2 If the tax year entered in line 1 is for less than 12 months, check reason: [ ] Initial return [ ] Final return
[ ] Change in accounting period

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	**3a**	$ 1,397.
b	If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	**3b**	$ 2,600.
c	**Balance due.** Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	**3c**	$ 0.

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions

LHA **For Privacy Act and Paperwork Reduction Act Notice, see Instructions.** Form **8868** (Rev 1-2012)

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01-04-12