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Form **990-PF**Department of the Treasury
Internal Revenue Service**Return of Private Foundation**
or Section 4947(a)(1) Nonexempt Charitable Trust
Treated as a Private Foundation

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

OMB No 1545-0052

2011For calendar year 2011 or tax year beginning **APR 1, 2011**, and ending **MAR 31, 2012**

Name of foundation MARSHALL AND MARY BRONDUM SPECIAL ASSISTANCE FOUNDATION, INC.		A Employer identification number 36-3700887
Number and street (or P.O. box number if mail is not delivered to street address) PO BOX 3106	Room/suite	B Telephone number 406-549-4148
City or town, state, and ZIP code MISSOULA, MT 59806		C If exemption application is pending, check here <input type="checkbox"/>
G Check all that apply: <input type="checkbox"/> Initial return <input type="checkbox"/> Initial return of a former public charity <input type="checkbox"/> Final return <input checked="" type="checkbox"/> Amended return <input type="checkbox"/> Address change <input type="checkbox"/> Name change		D 1. Foreign organizations, check here <input type="checkbox"/> Foreign organizations meeting the 85% test, 2. check here and attach computation <input type="checkbox"/>
H Check type of organization: <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col (c), line 16) \$ 3,528,957.	J Accounting method: <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(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		465.		N/A	
2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
3 Interest on savings and temporary cash investments		4.	4.		STATEMENT 1
4 Dividends and interest from securities		52,932.	52,932.		STATEMENT 2
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		140,803.			
b Gross sales price for all assets on line 6a		343,718.			
7 Capital gain net income (from Part IV, line 2)			140,803.		
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		7,972.	0.		STATEMENT 3
12 Total. Add lines 1 through 11		202,176.	193,739.		
13 Compensation of officers, directors, trustees, etc.		0.	0.		0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 4		15,000.	3,750.		11,250.
c Other professional fees					
17 Interest					
18 Taxes STMT 5		1,896.	0.		0.
19 Depreciation and depletion		100.	0.		
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 6		20,421.	364.		20,057.
24 Total operating and administrative expenses. Add lines 13 through 23		37,417.	4,114.		31,307.
25 Contributions, gifts, grants paid		96,470.			96,470.
26 Total expenses and disbursements. Add lines 24 and 25		133,887.	4,114.		127,777.
27 Subtract line 26 from line 12		68,289.			
a Excess of revenue over expenses and disbursements					
b Net investment income (if negative, enter -0-)			189,625.		
c Adjusted net income (if negative, enter -0-)				N/A	

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LHA For Paperwork Reduction Act Notice, see instructions

Form **990-PF** (2011)614
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SCANNED AUG 14 2013

**MARSHALL AND MARY BRONDUM
SPECIAL ASSISTANCE FOUNDATION, INC.**

36-3700887

Part II Balance Sheets <small>Attached schedules and amounts in the description column should be for end of year amounts only</small>		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	11,548.	5,444.	5,444.
	2 Savings and temporary cash investments	12,554.	15,731.	15,731.
	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 8	2,988,896.	3,064,454.	3,457,144.
	c Investments - corporate bonds STMT 9	50,005.	50,005.	49,797.
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less: accumulated depreciation ▶	147.		
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment: basis ▶ 695.			
	Less: accumulated depreciation STMT 7 ▶ 648.	0.	47.	47.
	15 Other assets (describe ▶ STATEMENT 10)	794.	794.	794.
	16 Total assets (to be completed by all filers)	3,063,944.	3,136,475.	3,528,957.
	17 Accounts payable and accrued expenses		2,988.	
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶ EXCISE TAX PAYABLE)	42.	1,296.	
Net Assets or Fund Balances	23 Total liabilities (add lines 17 through 22)	42.	4,284.	
	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> X			
	and complete lines 24 through 26 and lines 30 and 31.			
	24 Unrestricted	3,063,902.	3,132,191.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>			
	and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
Net Assets or Fund Balances	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances	3,063,902.	3,132,191.	
	31 Total liabilities and net assets/fund balances	3,063,944.	3,136,475.	

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	3,063,902.
2 Enter amount from Part I, line 27a	2	68,289.
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	3,132,191.
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	3,132,191.

**MARSHALL AND MARY BRONDUM
SPECIAL ASSISTANCE FOUNDATION, INC.**
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 PUBLICLY TRADED SECURITIES				
b CAPITAL GAINS DIVIDENDS				
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 210,000.		202,915.	7,085.	
b 133,718.			133,718.	
c				
d				
e				
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any		
a			7,085.	
b			133,718.	
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	140,803.
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	154,733.	3,041,066.	.050881
2009	195,159.	2,752,648.	.070899
2008	203,144.	2,982,460.	.068113
2007	251,061.	4,005,269.	.062683
2006	108,960.	3,809,252.	.028604
2 Total of line 1, column (d)			2 .281180
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 .056236
4 Enter the net value of noncharitable-use assets for 2011 from Part X, line 5			4 3,221,289.
5 Multiply line 4 by line 3			5 181,152.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 1,896.
7 Add lines 5 and 6			7 183,048.
8 Enter qualifying distributions from Part XII, line 4			8 127,777.

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

MARSHALL AND MARY BRONDUM
SPECIAL ASSISTANCE FOUNDATION, INC.**Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)**

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter: _____ (attach copy of letter if necessary-see instructions)		1	3,793.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input type="checkbox"/> and enter 1% of Part I, line 27b		2	0.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).		3	3,793.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		4	0.
3 Add lines 1 and 2		5	3,793.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments:			
a 2011 estimated tax payments and 2010 overpayment credited to 2011	6a	600.	
b Exempt foreign organizations - tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	1,296.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d TAX PAID W/O.R.	7	1,896.	
8 Enter any penalty for underpayment of estimated tax. Check here <input checked="" type="checkbox"/> if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9	1,897.	
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10		
11 Enter the amount of line 10 to be: Credited to 2012 estimated tax <input type="checkbox"/> Refunded <input type="checkbox"/>	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 instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		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. <input type="checkbox"/> \$ 0. (2) On foundation managers. <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities		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) MT		
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 2011 or the taxable year beginning in 2011 (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

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		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? Website address N/A	13	X	
14	The books are in care of JCCS, PC Telephone no 406-549-4148 Located at PO BOX 16237, MISSOULA, MT ZIP+4 59808			
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			
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? See the instructions for exceptions and filing requirements for Form TD F 90-22.1. If "Yes," enter the name of the foreign country N/A	16	Yes	No X

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

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

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A	1b	
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? If "Yes," list the years N/A	2a	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	2b	
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 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)	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)

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)? ☐ Yes ☒ No

Organizations relying on a current notice regarding disaster assistance check here ☐ N/A

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? ☐ 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?

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? ☐ Yes ☒ No

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
SEE STATEMENT 11		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

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."

[illegible]

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.

**MARSHALL AND MARY BRONDUM
SPECIAL ASSISTANCE FOUNDATION, INC.**
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	3,247,465.
b	Average of monthly cash balances	1b	22,879.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	3,270,344.
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	3,270,344.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	49,055.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,221,289.
6	Minimum investment return. Enter 5% of line 5	6	161,064.

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	161,064.
2a	Tax on investment income for 2011 from Part VI, line 5	2a	3,793.
b	Income tax for 2011 (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	3,793.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	157,271.
4	Recoveries of amounts treated as qualifying distributions	4	7,972.
5	Add lines 3 and 4	5	165,243.
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	165,243.

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	127,777.
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	127,777.
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	127,777.

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 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				165,243.
2 Undistributed income, if any, as of the end of 2011			0.	
a Enter amount for 2010 only				
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2011:				
a From 2006				
b From 2007				
c From 2008	12,856.			
d From 2009	58,117.			
e From 2010	249.			
f Total of lines 3a through e	71,222.			
4 Qualifying distributions for 2011 from Part XII, line 4: \$ 127,777.				
a Applied to 2010, but not more than line 2a			0.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2011 distributable amount				127,777.
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))	37,466.			37,466.
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	33,756.			
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				0.
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	33,756.			
10 Analysis of line 9				
a Excess from 2007				
b Excess from 2008				
c Excess from 2009	33,507.			
d Excess from 2010	249.			
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)

- 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.

[illegible]

- 3 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:

MMBSA FOUNDATION, 406-549-4148
PO BOX 3106, MISSOULA, MT 59806-3106

- b** The form in which applications should be submitted and information and materials they should include.

APPLICATION FORM ATTACHED

- c Any submission deadlines.

45 DAYS PRIOR TO QUARTERLY MEETINGS APR, JUL, OCT, JAN

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

PRIMARILY NORTHWEST USA

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				
PAUL AILPORT POLSON, MT 59860	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	5,000.
KATHERINE ARCHDALE WOLF POINT, MT 59201	NONE	N/A	ACCESSIBLE HOUSING	1,505.
BRIDGER BABCOCK ALBERTON, MT 59820	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	1,663.
JESSICA BEERS MISSOULA, MT 59801	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	1,100.
CAMP MAK-A-DREAM PO BOX 1450 MISSOULA, MT 59806	NONE	PUBLIC CHARITY	SPONSORSHIP OF CAMPERS	1,000.
Total	SEE CONTINUATION SHEET(S)			3a 96,470.
b Approved for future payment				
NONE				
Total			3b	0.

Enter gross amounts unless otherwise indicated.

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

123621
12-02-11

MARSHALL AND MARY BRONDUM
SPECIAL ASSISTANCE FOUNDATION, INC.

36-3700887

Part XV **Supplementary Information**

3 **Grants and Contributions Paid During the Year (Continuation)**

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
LINDA COMSTOCK MISSOULA, MT 59801	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	2,800.
GAIL COOK MISSOULA, MT 59808	NONE	N/A	ASSISTED LIVING	1,000.
TERRI DANIELS HAMILTON, MT 59840	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	1,030.
LEAH DEERING VICTOR, MT	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	1,668.
OWEN DEARDORFF HOT SPRINGS, MT 59845	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	1,520.
AMY DOCKERY MISSOULA, MT	NONE	N/A	MEDICAL/DENTAL REHAB	1,465.
M.E. DOVE KALISPELL, MT 59901	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	1,528.
VELMA DUMONTIER CUT BANK, MT 59427	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	4,270.
TRAVIS ERICKSON KALISPELL, MT 59901	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	1,400.
MEGAN FREESTAD MILES CITY, MT 59301	NONE	N/A	CAPITAL IMPROVEMENTS/EQUIPMENT	1,410.
Total from continuation sheets				86,202.

MARSHALL AND MARY BRONDUM
SPECIAL ASSISTANCE FOUNDATION, INC.

36-3700887

Part XV Supplementary Information

3 Grants and Contributions Paid During the Year (Continuation)

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
BRIDGET HANNA MISSOULA, MT 59802	NONE	N/A	HEARING	4,400.
CRYSTAL HANSON MISSOULA, MT	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	2,500.
HOMEWORD, INC. 127 N. HIGGINS AVE. MISSOULA, MT 59802	NONE	PUBLIC CHARITY	PURCHASE OF COMPUTERS	2,500.
BRYON LACEY BUTTE, MT	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	3,000.
FREDERICK MACE KALISPELL, MT	NONE	N/A	HEARING	1,500.
BRENTON MAYS KALISPELL, MT 59901	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	2,914.
TIFFANY METZLER BILLINGS, MT 59102	NONE	N/A	MEDICAL/DENTAL REHAB	2,486.
MISSOULA AGING SERVICES 337 STEPHENS AVE. MISSOULA, MT 59801	NONE	PUBLIC CHARITY	GENERAL SUPPORT OF LOCAL PROGRAMS	2,000.
MISSOULA YMCA 3000 S. RUSSELL ST. MISSOULA, MT 59801	NONE	PUBLIC CHARITY	GENERAL SUPPORT OF LOCAL PROGRAMS	1,000.
MONTANA VETERANS FOUNDATION 1112 LESLIE AVE. HELENA, MT 59601	NONE	PUBLIC CHARITY	GENERAL SUPPORT OF LOCAL PROGRAMS	1,000.
Total from continuation sheets				

MARSHALL AND MARY BRONDUM
SPECIAL ASSISTANCE FOUNDATION, INC.

36-3700887

Part XV **Supplementary Information**

3 Grants and Contributions Paid During the Year (Continuation)

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
LITTLE PLUME MURRAY MISSOULA, MT	NONE	N/A	PURCHASE OF PERSONAL COMPUTER	1,000.
TY NILES DARBY, MT 59829	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	1,500.
RAYMOND O'CONNOR GREAT FALLS, MT	NONE	N/A	CAPITAL IMPROVEMENTS/EQUIPMENT	2,315.
CLIFFORD & JEANNETTE PULVER FORSYTH, MT 59327	NONE	N/A	CAPITAL IMPROVEMENTS/EQUIPMENT	1,000.
THE PARENTING PLACE 1644 S. 8TH ST. W. MISSOULA, MT 59801	NONE	PUBLIC CHARITY	GENERAL SUPPORT OF LOCAL PROGRAMS	3,000.
BAONHIA VANG MISSOULA, MT	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	2,800.
LORI VELASQUEZ MISSOULA, MT	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	5,000.
NICOLE WHEELER SOMERS, MT	NONE	N/A	CAPITAL IMPROVEMENT/EQUIPMENT	1,183.
MICHAEL WOODS BILLINGS, MT	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	2,000.
HARRY WOOLSEY RONAN, MT 59864	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	1,500.
Total from continuation sheets				

36-3700887

3 Grants and Contributions Paid During the Year (Continuation)Total from continuation sheets

REPORT
FORM 990-PF PAGE 1

990-066

[illegible]

128102
05-01-11

(D) - Asset disposed

* ITC, Section 179, Salvage, Bonus, Commercial Revitalization Deduction

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
INTEREST INCOME	4.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	4.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DIVIDEND INCOME	183,475.	133,718.	49,757.
INTEREST INCOME	3,175.	0.	3,175.
TOTAL TO FM 990-PF, PART I, LN 4	186,650.	133,718.	52,932.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
REFUNDS	7,972.	0.	
TOTAL TO FORM 990-PF, PART I, LINE 11	7,972.	0.	

FORM 990-PF ACCOUNTING FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	15,000.	3,750.		11,250.
OTHER PROFESSIONAL FEES	0.	0.		0.
TO FORM 990-PF, PG 1, LN 16B	15,000.	3,750.		11,250.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
EXCISE TAX	1,896.	0.		0.
TO FORM 990-PF, PG 1, LN 18	1,896.	0.		0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MISC	1,460.	364.		1,096.
CLERICAL SERVICES	18,000.	0.		18,000.
INSURANCE	961.	0.		961.
TO FORM 990-PF, PG 1, LN 23	20,421.	364.		20,057.

FORM 990-PF	DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT	STATEMENT	7
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DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE	FAIR MARKET VALUE
OFFICE EQUIPMENT	695.	648.	47.	47.
TO 990-PF, PART II, LN 14	695.	648.	47.	47.

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
26,169 SH. THORNBURG INV INCOME BLDR CL A	509,515.	487,793.
45,947 SH. WR ADVISORS ACCUMULATIVE A	345,824.	386,411.
8,931 SH. WR ADVISORS BOND A	55,893.	57,875.
42,878 SH. WR ADVISORS CONTINENTAL INCOME A	299,973.	382,897.
72,397 SH. WR ADVISORS CORE INVESTMENT A	431,124.	472,027.
993 SH. WR ADVISORS GOVERNMENT SECURITIES A	5,763.	5,720.
15,907 SH. WR ADVISORS HIGH INCOME A	124,617.	114,529.

2,898 SH. WR ADVISORS MUNICIPAL BOND	20,949.	21,881.
47,985 SH. WR ADVISORS NEW CONCEPTS A	378,850.	498,562.
19,000 SH. WR ADVISORS SCIENCE AND TECHNOLOGY A	166,341.	203,296.
32,071 SH. WR ADVISORS VANGUARD A	263,353.	302,753.
5,773 SH. AMERICAN CENTURY INVESTMENTS SELECT	236,619.	258,622.
9,297 SH. AMERICAN CENTURY INVESTMENTS GROWTH	225,633.	264,778.
TOTAL TO FORM 990-PF, PART II, LINE 10B	3,064,454.	3,457,144.

FORM 990-PF	CORPORATE BONDS	STATEMENT	9
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
50,000 GMAC SMART NOTES 6.35% 5/15/13	50,005.	49,797.
TOTAL TO FORM 990-PF, PART II, LINE 10C	50,005.	49,797.

FORM 990-PF	OTHER ASSETS	STATEMENT	10
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DESCRIPTION	BEGINNING OF YR BOOK VALUE	END OF YEAR BOOK VALUE	FAIR MARKET VALUE
ACCRUED INTEREST RECEIVABLE	794.	794.	794.
TO FORM 990-PF, PART II, LINE 15	794.	794.	794.

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT 11
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NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
KEN CARUSO 8450 US HIGHWAY 10 W MISSOULA, MT 59808	PRESIDENT 1.00	0.	0.	0.
KATHY FLYNN 607 SW HIGGINS MISSOULA, MT 59801	TRUSTEE 1.00	0.	0.	0.
SABRINA WHITE 2620 CONNERY WAY MISSOULA, MT 59808	TREASURER 1.00	0.	0.	0.
ANNA MARTELLO 306 RAILROAD ST W STE 110 MISSOULA, MT 59802	TRUSTEE 1.00	0.	0.	0.
JAMES E CONGDON 445 BROOKS STREET MISSOULA, MT 59801	TRUSTEE 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		0.	0.	0.

GENERAL EXPLANATION FORM AND LINE REFERENCES	STATEMENT 12
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FORM/LINE IDENTIFIER	DESCRIPTION/RETURN REFERENCE
FORM 990-PF	AMENDED RETURN

GENERAL EXPLANATION

STATEMENT 13

THERE WAS A CALCULATION ERROR REGARDING THE AVERAGE NET INVESTMENT VALUES FOR 2011. QUARTERLY INVESTMENT VALUES WERE ENTERED INTO THE TAX PREPARATION SOFTWARE BUT WERE MISTAKINGLY CALCULATED AS MONTHLY VALUES, RESULTING IN AN UNDERSTATED AVERAGE INVESTMENT VALUE ON THE 2011 RETURN, AND AS A RESULT, INSUFFICIENT EXCISE TAX AND MINIMUM DISTRIBUTIONS WERE CALCULATED.

CHANGES TO THE ORIGINAL RETURN ARE REFLECTED IN PART V LINES 4, 5, AND 7 AS WELL AS PART VI LINE 1, PART X, PART XI, PART XII, AND PART XIII.

GENERAL EXPLANATION
FORM AND LINE REFERENCES

STATEMENT 14

FORM/LINE IDENTIFIER

DESCRIPTION/RETURN REFERENCE

PART V

QUALIFICATION FOR REDUCED TAX ON NET
INVESTMENT INCOME

GENERAL EXPLANATION

STATEMENT 15

NET VALUE OF NONCHARITABLE USE ASSETS (LINE 4) CHANGED FROM \$1,073,762 TO \$3,221,289 AS A RESULT OF THE RECALCULATION OF INVESTMENT VALUES. THIS ALSO RESULTS IN A CHANGE IN LINE 5 FROM \$60,384 TO \$181,552 AND CHANGES LINE 7 FROM \$62,880 TO \$183,048.

GENERAL EXPLANATION
FORM AND LINE REFERENCES

STATEMENT 16

FORM/LINE IDENTIFIER

DESCRIPTION/RETURN REFERENCE

PART VI

EXCISE TAX BASED ON INVESTMENT INCOME

GENERAL EXPLANATION

STATEMENT 17

THE AMENDED RETURN, AS A RESULT OF THE CHANGES IN PART V, REFLECTS A TOTAL ON LINE 1 OF \$3,793 INSTEAD OF \$1,896. PAYMENTS MADE WITH THE ORIGINAL RETURN ARE REFLECTED ON LINE 7 (\$1,896). RESULTING AMOUNT DUE OF \$1,897 IS REFLECTED ON LINE 9.

GENERAL EXPLANATION
FORM AND LINE REFERENCES

STATEMENT 18

FORM/LINE IDENTIFIER

DESCRIPTION/RETURN REFERENCE

PART X

MINIMUM INVESTMENT RETURN

GENERAL EXPLANATION

STATEMENT 19

AVERAGE MONTHLY FMV OF SECURITIES WAS RECALCULATED AND ADJUSTED TO \$3,247,465 FROM \$1,082,488 ON LINE 1A. LINE 1B WAS RECALCULATED TO \$22,879 FROM \$7,626, CHANGING THE TOTAL FOR LINE 1D FROM \$1,090,114 TO \$3,270,344. LINE 3 CHANGES IN THE AMENDED RETURN TO \$3,270,344 FROM \$1,090,114. LINE 4 CHANGES FROM \$16,352 TO \$49,055. LINE 5 CHANGES FROM \$1,073,762 TO \$3,221,289, WHICH RESULTS IN A CHANGE IN LINE 6 FROM \$53,688 TO \$161,064.

GENERAL EXPLANATION
FORM AND LINE REFERENCES

STATEMENT 20

FORM/LINE IDENTIFIER

DESCRIPTION/RETURN REFERENCE

PART XI

DISTRIBUTABLE AMOUNT

GENERAL EXPLANATION

STATEMENT 21

LINE 1 REFLECTS THE CHANGES INDICATED IN PART X. LINE 2A REFLECTS THE CHANGES IN PART VI. THESE CHANGES RESULT IN LINE 3 CHANGING FROM \$51,792 TO \$157,271. DISTRIBUTABLE AMOUNT ON LINE 7 CHANGES FROM \$59,764 TO \$165,243.

GENERAL EXPLANATION
FORM AND LINE REFERENCES

STATEMENT 22

FORM/LINE IDENTIFIER

DESCRIPTION/RETURN REFERENCE

PART XII

QUALIFYING DISTRIBUTIONS

GENERAL EXPLANATION

STATEMENT 23

AS A RESULT OF THE RECALCULATION OF RATE OF TAX ON NET INVESTMENT INCOME, LINE 6 CHANGES FROM \$125,881 TO \$127,777.

GENERAL EXPLANATION
FORM AND LINE REFERENCES

STATEMENT 24

FORM/LINE IDENTIFIER

DESCRIPTION/RETURN REFERENCE

PART XIII

UNDISTRIBUTED INCOME

GENERAL EXPLANATION

STATEMENT 25

LINE 1 REFLECTS THE CHANGES FROM PART XI LINE 7. LINE 4C CHANGES FROM \$59,764 TO \$127,777. LINE 5 CHANGES FROM \$0 TO \$37,466 AS A RESULT. LINE 6A CHANGES FROM \$139,235 TO \$33,756 WHICH CARRIES DOWN TO LINE 9. LINE 10 SHOULD REFLECT CORPUS AMOUNTS OF \$33,507 AND \$249 FOR 2009 AND 2010, RESPECTIVELY, FROM THE ORIGINAL RETURN AMOUNTS OF \$12,856, \$58,117, \$249, AND \$68,013 FOR 2008, 2009, 2010, AND 2011, RESPECTIVELY.

Application for Extension of Time To File an Exempt Organization Return

OMB No. 1545-1709

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

- If you are filing for an **Automatic 3-Month Extension**, complete only **Part I** and check this box ☒
- 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 File by the due date for filing your return. See instructions.	Name of exempt organization or other filer, see instructions MARSHALL AND MARY BRONDUM SPECIAL ASSISTANCE FOUNDATION, INC.	Employer identification number (EIN) or <input checked="" type="checkbox"/> 36-3700887
	Number, street, and room or suite no. If a P.O. box, see instructions. PO BOX 3106	Social security number (SSN) <input type="checkbox"/>
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. MISSOULA, MT 59806	

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

04

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

JCCS, PC

- The books are in the care of ► **PO BOX 16237 - MISSOULA, MT 59808**

Telephone No. ► **406-549-4148**

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 **NOVEMBER 15, 2012**, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
- ☐ calendar year _____ or
- ☒ tax year beginning **APR 1, 2011**, and ending **MAR 31, 2012**

- 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	\$ 1,896.
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	\$ 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	\$ 1,296.

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)