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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

For	calendar year 2011 or tax year beginning APR	1, 2011	, and ending	MAR 31, 2012	2
	ne of foundation			A Employer identificatio	n number
	ARSHALL AND MARY BRONDUM PECIAL ASSISTANCE FOUNDAT	TON THE		26 270000	7
	PECIAL ASSISTANCE FOUNDAT	<u> </u>	Room/suite	36-3700885	<u> </u>
	O BOX 3106	200,000,	Troding date	406-549-41	148
	or town, state, and ZIP code		<u>.</u>	C if exemption application is	
	ISSOULA, MT 59806				
G	theck all that apply: Initial return		ormer public charity	D 1. Foreign organization	s, check here
	Final return	X Amended return		Foreign organizations m	eeting the 85% test
	Address change	Name change		Foreign organizations m 2, check here and attach c	omputation
H	theck type of organization: X Section 501(c)(3) ex Section 4947(a)(1) nonexempt charitable trust	empt private toundation Other taxable private founda	ation	E If private foundation sta	
L Es	ir market value of all assets at end of year J Accounti	<u></u>	X Accrual	under section 507(b)(1	
		her (specify)	71001001	F If the foundation is in a under section 507(b)(1	
, ⊳			basis)	a 555,511 551 (5)(1)(D), CC.
Pa	Analysis of Revenue and Expenses (The total of amounts to columns (b) (c) and (d) may not	(a) Revenue and	(b) Net investment	(c) Adjusted net	(d) Disbursements for charitable purposes
	(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))	expenses per books	income	income	(cash basis only)
	1 Contributions, gifts, grants, etc., received	465.		N/A	ļ
	2 Check X if the foundation is not required to attach Sch. B interest on savings and temporary	4.	4.	<u>. </u>	STATEMENT 1
	cash investments Dividends and interest from securities	52,932.	52,932.		STATEMENT 2
	5a Gross rents	32,332.	32,332		ÇIMIDINI Z
	b Net rental income or (loss)			-	
6 0	6a Net gain or (loss) from sale of assets not on line 10	140,803.			
Revenue	b Gross sales price for all 343,718.				
ě	7 Capital gain net income (from Part IV, line 2)	- 199	140,803.	-	
ш	8 Net short-term capital gain				
	9 Income modifications RECEIVES	<u> </u>			
	Tod and allowances	2 101			
	c Gross profit or (loss)				
	11 Other income	7,972.	0.		STATEMENT 3
	12 Total. Add lines 1 through 44 COFN	202,176.	193,739.		
	13 Compensation of officers, directors, trustees, etc.	0.	0.		0.
	14 Other employee salaries and wages				
S	15 Pension plans, employee benefits				
enses	16a Legal fees STMT 4	15,000.	3,750.		11,250
ž	c Other professional fees	237000	3,7300		11,130
Ve E	17 Interest				
rrati	18 Taxes STMT 5	1,896.	0.		0
inist	19 Depreciation and depletion	100.	0.		
	20 Occupancy				
ΑÞ	21 Travel, conferences, and meetings		·		
gan	22 Printing and publications23 Other expensesSTMT 6	20,421.	364.		20,057
ij.	24 Total operating and administrative	20,111	332		
Operating and Administrative Expe	expenses. Add lines 13 through 23	37,417.	4,114.		31,307
Ō	25 Contributions, gifts, grants paid	96,470.			96,470
	26 Total expenses and disbursements.	400 000	4 4 4 4 4		100 000
	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-)	00,209.	189,625.		
	C Adjusted net income (if negative, enter -0-)			N/A	

123501 12-02-11 LHA For Paperwork Reduction Act Notice, see instructions

Form **990-PF** (2011)

Form 990-PF (2011)	SPECIAL	ASSISTAN	CE FOUN	DATION,	IN
	MARSHALL	, AND MAR	Y BROND	NUM	

c. 36-3700887 Page 2 Beginning of year End of year Part II Balance Sheets Attached schedules and amounts in the description column should be for end of year amounts only (a) Book Value (b) Book Value (c) Fair Market Value 11,548 5,444 5,444. 1 Cash - non-interest-bearing 15,731 12,554 15,731. 2 Savings and temporary cash investments 3 Accounts receivable Less allowance for doubtful accounts 4 Pledges receivable Less: allowance for doubtful accounts 5 Grants receivable 6 Receivables due from officers, directors, trustees, and other disqualified persons 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 2,988,896. 3,064,454. 3,457,144. STMT b Investments - corporate stock STMT 9 50,005. 50,005. c Investments - corporate bonds 11 Investments - land, buildings, and equipment basis 147 Less accumulated depreciation 12 Investments - mortgage loans 13 Investments - other 695 14 Land, buildings, and equipment; basis Ô 47. 648. 47 STMT 7 Less accumulated depreciation 794. 794. STATEMENT 10 794. 15 Other assets (describe ▶ 3,063,944 3,136,475 3,528,957. 16 Total assets (to be completed by all filers) 2,988. Accounts payable and accrued expenses 18 Grants payable 19 Deferred revenue Loans from officers, directors, trustees, and other disqualified persons 21 Mortgages and other notes payable 22 Other liabilities (describe ► EXCISE TAX PAYABLE) 42. 1,296.42. 4,284 23 Total liabilities (add lines 17 through 22) ▶ X Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31. 3,063,902. 3,132,191 24 Unrestricted 25 Temporarily restricted 26 Permanently restricted Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. 27 Capital stock, trust principal, or current funds 28 Paid-in or capital surplus, or land, bldg, and equipment fund 29 Retained earnings, accumulated income, endowment, or other funds 3,063,902. 3,132,191. 30 Total net assets or fund balances 3,063,944. 3,136,475 31 Total liabilities and net assets/fund balances **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	Г	
	(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.

Net Assets or Fund Balances

SPECIAL ASSISTANCE FOUNDATION, INC.

36-3700887 Page 3

Part IV Capital Gains a	and Losses for Tax on I	nvestment	Income					
	ibe the kind(s) of property sold (e.rehouse; or common stock, 200 st			(b) H	ow acquired Purchase Donation	(c) Date (mo., d	acquired ay, yr.)	(d) Date sold (mo., day, yr.)
12 PUBLICLY TRADE	D SECURITIES					-	*****	
b CAPITAL GAINS	DIVIDENDS							
C								
d								
e				ــــــــــــــــــــــــــــــــــــــ				
(e) Gross sales price	(f) Depreciation allowed (or allowable)		t or other basis xpense of sale			(h) G (e) plus	ain or (loss s (f) minus	(g)
a 210,000.		<u> </u>	202,91	.5 •				7,085. 133,718.
ь 133,718.								133,718.
<u>C</u>								
d								
_e		<u> </u>	10/04/00					
Complete only for assets showin	g gain in column (h) and owned by						Col. (h) gain not less tha	
(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69		cess of col. (ı) col (ı), ıf any		CC		(from col	
a								7,085.
b								133,718.
С								
d								
е	-							
2 Capital gain net income or (net ca	pital loss) { If gain, also enter-	er in Part I, line 0- in Part I, line	7 7	}	2			140,803.
, , ,	•		•	7				
3 Net short-term capital gain or (los If gain, also enter in Part I, line 8,		iliu (o)		7				
If (loss), enter -0- in Part I, line 8	column (c).			Ŋ	3		N/A	•
Part V Qualification U	nder Section 4940(e) fo	r Reduced	Tax on Net	Inve	estment In	come	·	
(For optional use by domestic private	foundations subject to the section	4940(a) tax on	net investment ir	ncome.	.)			
If section 4940(d)(2) applies, leave the	ns part blank.							
Was the foundation liable for the sect	tion 4942 tax on the distributable a	mount of any vi	ear in the base ne	rınd?				Yes X No
If "Yes," the foundation does not qual		omplete this pa	rt					
(a)	(b)	a dollono botoro	making any oner	(c)				(d) bution ratio
Base periód years Calendar year (or tax year beginnii	Administration of a control of a feet and a control of a	stributions	Net value of no		ıtable-use asset	s	Distri	bution ratio vided by col. (c))
2010	'9 '''/	54,733.	-	-3	,041,06		(0011 (0) 01	.050881
2009		95,159.			,752,64			.070899
2008		03,144.			,982,46			.068113
2007		51,061.			,005,26			.062683
2006		08,960.			,809,25		•	.028604
2000		- 7 2 0 0 1			, 00 3 , 20.		Г	
2 Total of line 1, column (d)						2		.281180
3 Average distribution ratio for the	5-voar bace period - divide the tota	l on line 2 by 5	or by the number	r of ves	are	-		*201100
the foundation has been in exister		on mie z by o,	or by the number	UI yu	113	3		.056236
the foundation has been in exister	lice il less than 5 years					-3-		.030230
A. Enter the net value of pencharitah	Jo-use assets for 2011 from Part Y	line 5				4		3,221,289.
4 Enter the net value of noncharitab	ne-use assets for 2011 from Part A	., inte 5				"		3,221,203
E. Multiply line 4 by line 0						5		181,152.
5 Multiply line 4 by line 3						"	<u> </u>	101,132.
C. Fatan 40/ of not investment income	no (10) of Port Line (17h)					6		1,896.
6 Enter 1% of net investment incon	1e (1% of Part I, line 270)					6		1,000.
7 Add book 5 4 C						,		183,048.
7 Add lines 5 and 6						7	+	100,040.
8 Enter qualifying distributions from	n Part XII line 4					8		127,777.
		o the and so	alata that sast	20 C 10	/ toy roto		<u> </u>	
If line 8 is equal to or greater than See the Part VI instructions	n line 7, check the box in Part VI, lir	ie iu, and comp	nete tilat part usif	ıya 1%	o lax fale.			
GGC the Fart VI man actions								000 DE (0044)

Form 990-PF (2011) SPECIAL ASSISTANCE FOUNDATION, INC. 36-3700887 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% 1 of Part I, line 27b c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b). 2 2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-) 3 4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) 4 5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-5 6 Credits/Payments: 600. a 2011 estimated tax payments and 2010 overpayment credited to 2011 b Exempt foreign organizations - tax withheld at source 6b 1,296. c Tax paid with application for extension of time to file (Form 8868) 6с d Backup withholding erroneously withheld 6d 7 Total credits and payments. Add lines 6a through 6d TAX PAID W/O.R.1,896. 8 Enter any penalty for underpayment of estimated tax. Check here X if Form 2220 is attached 8 1,897. 9 9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed 10 Overpayment If line 7 is more than the total of lines 5 and 8, enter the amount overpaid 10 Refunded > 11 Enter the amount of line 10 to be: Credited to 2012 estimated tax 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 X 1a any political campaign? Х b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? 1b 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 1c c Did the foundation file Form 1120-POL for this year? 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. ▶ \$ e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. > \$ X 2 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 3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or 3 bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes 4a Did the foundation have unrelated business gross income of \$1,000 or more during the year? N/A b If "Yes," has it filed a tax return on Form 990-T for this year? 4b X 5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? 5 If "Yes," attach the statement required by General Instruction T 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 X remain in the governing instrument? Х 7 Did the foundation have at least \$5,000 in assets at any time during the year? 7 If "Yes," complete Part II, col (c), and Part XV. 8a Enter the states to which the foundation reports or with which it is registered (see instructions) MTb If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) Χ̈ 8b of each state as required by General Instruction G? If "No," attach explanation 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 10 10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses

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Form 990-PF (2011) SPECIAL ASSISTANCE FOUNDATION, INC.

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Pa	rt 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		Х
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		х
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 \blacktriangleright JCCS, PC Telephone no \blacktriangleright 406-54	9-4	148	
	Located at ▶ PO BOX 16237, MISSOULA, MT ZIP+4 ▶59	808		
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here			$\cdot \Box$
	and enter the amount of tax-exempt interest received or accrued during the year	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,	.	Yes	
	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			l '
_	country Aviation for Miles I Form 4700 March Department			. ا
Pa	rt VII-B Statements Regarding Activities for Which Form 4720 May Be Required	-	V	
	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 X No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? Yes X No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person? Yes X No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?			
	(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)?			Ι,
	(6) Agree to pay money or property to a government official? (Exception. Check "No"			<u>'</u>
	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.)			
t	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 X No			
	If "Yes," list the years , , , , , , , , , , , , , , , , , , ,			
	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		
	statement - see instructions) If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here.	20		
3:	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time			
	during the year? Yes X No	į		'
ŀ	of "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		
48	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		Х
	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

Form 990-PF (2011) SPECIAL ASSISTANCE FOUNDATION. 36-3700887 Page 6 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: Yes X No (1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? (2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, Yes X No any voter registration drive? Yes X No (3) Provide a grant to an individual for travel, study, or other similar purposes? (4) Provide a grant to an organization other than a charitable, etc., organization described in section Yes X No 509(a)(1), (2), or (3), or section 4940(d)(2)? (5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for Yes X No the prevention of cruelty to children or animals? b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations N/A 5b section 53.4945 or in a current notice regarding disaster assistance (see instructions)? 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 N/A Yes No expenditure responsibility for the grant? 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 Yes X No a personal benefit contract? X 6b b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? If "Yes" to 6b, file Form 8870 Yes X No 7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? 7b b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A Information About Officers, Directors, Trustees, Foundation Managers, Highly Part VIII Paid Employees, and Contractors 1 List all officers, directors, trustees, foundation managers and their compensation. (c) Compensation (d) Contributions to employee benefit plans and deterred compensation (b) Title, and average hours per week devoted to position (e) Expense account, other (If not paid, enter -0-) (a) Name and address allowances 0 0 SEE STATEMENT 11 0. 2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE." (d) Contributions to employee benefit plans and deferred compensation (e) Expense account, other allowances (b) Title, and average (a) Name and address of each employee paid more than \$50,000 hours per week devoted to position (c) Compensation NONE

Total number of other employees paid over \$50,000

Form 990-PF (2011)

SPECIAL ASSISTANCE FOUNDATION, INC.

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Part VIII Information About Officers, Directors, Trustees, Foundat Paid Employees, and Contractors (continued)	ion Managers, Highly	
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		
	1	
	_	
		-
	4	
	-	
	 	
	1	
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 statistic	cal information such as the	Expenses
number of organizations and other beneficiaries served, conferences convened, research papers produ	ced, etc.	
1 N/A		
2		
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 li	nes 1 and 2	Amount
1 N/A		
2		
All other program-related investments. See instructions.		
3		
Total Add lines 1 through 3	▶	0.
Total. Add lines 1 through 3		5 000 DE (0041)

Form 990-PF (2011)

Part X Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see instructions) Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes: 3,247,465. a Average monthly fair market value of securities 1a 22,879. 1b b Average of monthly cash balances c Fair market value of all other assets 10 3,270,344. 1đ d Total (add lines 1a, b, and c) e Reduction claimed for blockage or other factors reported on lines 1a and 0. 1c (attach detailed explanation) 1e 2 Acquisition indebtedness applicable to line 1 assets 2 3 Subtract line 2 from line 1d Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) 4 3,221,289 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 5 161,064. 6 Minimum investment return. Enter 5% of line 5 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) 161,064. Minimum investment return from Part X, line 6 2a_ 3,793. Tax on investment income for 2011 from Part VI, line 5 b Income tax for 2011 (This does not include the tax from Part VI.) 2c Add lines 2a and 2b C Distributable amount before adjustments. Subtract line 2c from line 1 3 3 4 Recoveries of amounts treated as qualifying distributions 165,243. 5 5 Add lines 3 and 4 6 0. 6 Deduction from distributable amount (see instructions) 165. 243. Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 Part XII Qualifying Distributions (see instructions) Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes: 127,777. a Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26 1a 1b **b** Program-related investments - total from Part IX-B Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes 2 2 3 Amounts set aside for specific charitable projects that satisfy the: a Suitability test (prior IRS approval required) 3a b Gash distribution test (attach the required schedule) 3b 127.777. 4 Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4 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 Adjusted qualifying distributions. Subtract line 5 from line 4 6 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

Form **990-PF** (2011)

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				
a Enter amount for 2010 only			0.	
b Total for prior years				
2 · · · · · · · · · · · · · · · · · · ·		0.		1
3 Excess distributions carryover, if any, to 2011:		<u> </u>		· · · · · · · · · · · · · · · · · · ·
a From 2006				
b From 2007				!
c From 2008 12,856.				
dFrom 2009 58,117.				•
eFrom 2010 249.				
f Total of lines 3a through e	$\overline{71},\overline{222}.$			
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.			<u> </u>
5 Excess distributions carryover applied to 2011	37,466.		İ	37,466.
(If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as				
indicated below:	33,756.			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	33,/30.			<u> </u>
b Prior years' undistributed income. Subtract		۸		
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		0.		
assessed		U •		
d Subtract line 6c from line 6b. Taxable		0.		
amount - see instructions	·	· · ·	-	<u> </u>
e Undistributed income for 2010. Subtract line			0.	
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			}	
				0.
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.			
				<u></u>
-	0.			
not applied on line 5 or line 7				
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a	33,756.		ļ	
10 Analysis of line 9	33,730.			
a Excess from 2007				
b Excess from 2008				
c Excess from 2009 33,507.				
d Excess from 2010 249.				
e Excess from 2011		<u> </u>	<u>. </u>	5 000 DE (0044)

Form 990-PF (2011) SPECIAL ASSISTANCE FOUNDATION, INC.

36-	27	$\Lambda \Lambda C$	07
. o c	<i>31</i>	UUC	00/

Page 10

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.	Part XIV Private Operating Fo	oundations (see ins	structions and Part VII-	A, question 9)	N/A		
Deck box to inclazie whether the foundation is a grivate operating foundation described in section APAZIONS OF the adjust of a Income from Part I or the minimum invastment return from Part IX for each year listed APAZIONS OF the Case Coulsifying distributions from Part XII, Intel 4 for each year listed APAZIONS OF active conduct of exempt activities. Subreat line 2 of or active conduct of exempt activities. Subreat line 2 of or active conduct of exempt activities. Subreat line 2 of from the 2c. Complete 3a, box or for the alternative test - enter: (1) Visus or all assets (2) Visus or assist qualifying under section 4942((3)(8)(9)) Findowment alternative test - enter: (1) Visus or assist qualifying under section 4942((3)(8)(9)) Findowment alternative test - enter: (1) Visus or assist qualifying under section 4942((3)(8)(9)) (2) Visus or assist qualifying under section 4942((3)(8)(9)) (3) Visus or assist qualifying under section 4942((3)(8)(9)) (4) Costs minimum investment return substantial costs of the foundation in the conduction securities bears (section 512((5)(5)) or repoties) (2) Support from general public orger scations as provided in section 4942((3)(8)(9)) (4) Costs minimum or substantial return assist of the scatter of the scatter at any time during the year - see instructions.) Information Regarding Foundation Managers: a Lest any managers of the foundation who own 10% or mere of the scatck of a corporation (or an equally large portion of the overathy of a partnership or other circle) of which the bundation has a 10% or greater inclined. NONDE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: Information Regarding Contribution who own 10% or mere of the scatch of a corporation (or an equally large portion of the overathy of a partnership or other circle) of which the bundation has a 10% or greater inclined. NONDE Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs: In the scatter of which the	1 a If the foundation has received a ruling or	determination letter that	it is a private operating				
2 a First the lesser of the adoleside net important on the process of the adoleside net important on the process of the proces	foundation, and the ruling is effective for	2011, enter the date of t	he ruling	▶			
2 a First the lesser of the adoleside net important on the process of the adoleside net important on the process of the proces	b Check box to indicate whether the found	ation is a private operatin	ig foundation described in	n section	4942(j)(3) or 49	42(j)(5)	
investment return from Part X for each year listed b 85% of line 2 C Qualifying distributions from Part XII, think of reach year listed d Amounts included in line 2c not used directly for active conduct of exempt activities Qualifying distributions made directly for active conduct of exempt activities. Solitotate line 2d from line 2c and second control of exempt activities. Solitotate line 2d from line 2c and second control of exempt activities. Solitotate line 2d from line 2c additional control of exempt activities. Solitotate line 2d from line 2c additional control of exempt activities. Solitotate line 2d from line 2c additional control of exempt activities. Solitotate line 2d from line 2c additional control of exempt activities. Solitotate line 2d from line 2c additional control of exempt activities. Solitotate line 2d from line 2c additional control of exempt activities. 2d from line 2c additional control of exempt activities. Solitotate line 2d from line 2c additional control of exempt activities. Solitotate line 2d from line 2c and line activities. Solitotate line 2d from line 2c additional control of exempt activities. 2d of minimum investment return shown in Part X line 6 for each year line and exempt control of exempt activities. Solitotate line 2d from line 2c and exempt line activities. Solitotate line 2c additional control of exempt activities. Solitotate line 2c additional line activities and exempt line activities and exem	2 a Enter the lesser of the adjusted net						
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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)(8)(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 \$07(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 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 b 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. d Any submission deadlines.		II.					
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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							
d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors		RTERLY MEET	INGS APR, J	UL, OCT, J	AN		
·							
			·	·			

Part XV | Supplementary Information (continued) Grants and Contributions Paid During the Year or Approved for Future Payment If recipient is an individual, Recipient Purpose of grant or contribution show any relationship to Foundation Amount any foundation manager status of Name and address (home or business) or substantial contributor recipient a Paid during the year NONE ASSISTIVE PAUL AILPORT N/A EQUIPMENT/DEVICE POLSON, MT 59860 5,000. ACCESSIBLE HOUSING KATHERINE ARCHDALE NONE N/A 1,505. WOLF POINT, MT 59201 BRIDGER BABCOCK NONE N/A ASSISTIVE EQUIPMENT/DEVICE ALBERTON, MT 59820 1,663. NONE JESSICA BEERS N/A ASSISTIVE EQUIPMENT/DEVICE MISSOULA, MT 59801 1,100. CAMP MAK-A-DREAM NONE PUBLIC CHARITY SPONSORSHIP OF CAMPERS PO BOX 1450 MISSOULA, MT 59806 1,000. CONTINUATION SHEET(S) SEE 96,470. Total ▶ 3a b Approved for future payment NONE

Ο.

▶ 3b

Tota!

Form 990-PF (2011)

Enter gross amounts unless otherwise indicated.	Unrelated t	usiness income		y section 512, 513, or 514	(e)	
Š	(a) Business	(b) Amount	(C) Exclu- sion	(d) Amount	Related or exempt function income	
1 Program service revenue:	code	Ainount	code	Aillouilt	Tunction income	
a						
b						
<u> </u>	_		\perp			
d	_					
e	_		-		· · · · · · · · · · · · · · · · · · ·	
†	_					
g Fees and contracts from government agencies			\perp			
2 Membership dues and assessments						
3 Interest on savings and temporary cash			1 4	4		
investments			14	4.		
4 Dividends and interest from securities			14	52,932.		
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				140 000		
than inventory			18	140,803.		
9 Net income or (loss) from special events			\bot			
10 Gross profit or (loss) from sales of inventory						
11 Other revenue:						
a REFUNDS	_				7,972	
b						
C	_					
d	_					
e				100 700		
12 Subtotal. Add columns (b), (d), and (e)			0.	193,739.	7,972	
13 Total Add line 12, columns (b), (d), and (e)				13	201,711	
(See worksheet in line 13 instructions to verify calculation	s.)					
Part XVI-B Relationship of Activitie	es to the Accon	plishment of	Exempt P	urposes		
Line No. Explain below how each activity for which the foundation's exempt purposes (other				importantly to the accomp	olishment of	
11 REFUNDS AND UNCLAIME				ING ORGANIZA	TION	

Form 990-PF (2011) SPECIAL ASSISTANCE FOUNDATION, INC. 36-3700887 Page 13 Part XVII Information Regarding Transfers To and Transactions and Relationships With Noncharitable Exempt Organizations

ו טום נ	ne organization directly or indir	ectly engage in any of the following	ig with any other organization	described in section 50 I(c) of	- L	162	NO
the C	Code (other than section 501(c)	(3) organizations) or in section 52	27, relating to political organiz	ations?			ŧ
a Trans	sfers from the reporting founda	ation to a noncharitable exempt or	ganızatıon of:				
(1)	Cash				1a(1)		X
(2)	Other assets				1a(2)		X
b Othe	r transactions:				1		
(1)	Sales of assets to a noncharital	ole exempt organization			1b(1)		X
(2)	Purchases of assets from a nor	ncharitable 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 me	mbership or fundraising solicitation	ons		1b(6)		X
c Shar	ing of facilities, equipment, ma	ılıng lists, other assets, or paid em	ployees		10		X
	•		• •	ays show the fair market value of the goods,		its,	
				in any transaction or sharing arrangement,	show in		
colui		other assets, or services received.		•			
a)Line no	(b) Amount involved	(c) Name of noncharitable	e exempt organization	(d) Description of transfers, transactions, and	i sharing arra	ıngemer	nts
		N/A					
			····				
							
2a Is th	e foundation directly or indirect	tly affiliated with, or related to, one	e or more tax-exempt organiza	ations described			
	•	r than section 501(c)(3)) or in sec		Γ	Yes	X	No
	es," complete the following sch			_			
	(a) Name of org		(b) Type of organization	(c) Description of relations	ship		
	N/A		, , , , , , , , , , , , , , , , , , ,				
			 	<u> </u>			
	_		· · ·				
			 				
1	Under penalties of periory, I declare	that I have examined this return, includi	ng accompanying schedules and s	tatements, and to the best of my knowledge			
	and belief, it is true, correct, and cor	blete Declaration of preparer (other the		ition of which preparer has any knowledge	lay the IRS di turn with the	prepare	ihis er
Here	A Ken L	aruse	17/2/12		nown below (see inst	7' H
	Signature of officer or trustee		Date	Title	A Yes		J No ∣
	Print/Type preparer's na			Date Check If PTIN			
	DAVID L. G		7\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\\	self- employed			
Paid	CPA	TUMEY, (~) .	JHMI. 1.		08259	03E	
		PEDMIED CLADA	TAMDANETTA COUT	EVENS PC Firm's EIN > 81-0			
Prepa		KERMIER, CLARK, C	AMPARELLA, STE	FATINS LC Limu,s EIN ▶ 8T-0	1348/	13	
Use O		0 500 16000					
	1	O. BOX 16237			E 4 0		^
	MI	SSOULA, MT 5980	18	Phone no. 406-	-549-4	<u>414</u>	8
				_	- 000		00441

Part XV Supplementary Information 3 Grants and Contributions Paid During the		<u> </u>	<u> </u>	
Recipient	If recipient is an individual,	T		
Name and address (home or business)	show any relationship to any foundation manager	Foundation status of	Purpose of grant or contribution	Amount
	or substantial contributor	recipient	-	
		1.		
LINDA COMSTOCK	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	
MISSOULA, MT 59801				2,800.
GAIL COOK	NONE	N/A	ASSISTED LIVING	
MISSOULA, MT 59808				1,000.
TERRI DANIELS	NONE	N/A	ASSISTIVE	
HAMILTON, MT 59840			EQUIPMENT/DEVICE	1,030.
LEAH DEERING	NONE	N/A	ASSISTIVE	
VICTOR, MT			EQUIPMENT/DEVICE	1,668.
VICTOR, MI				1,000.
OWEN DEARDORFF	NONE	N/A	ASSISTIVE	
			EQUIPMENT/DEVICE	
HOT SPRINGS, MT 59845				1,520.
AMY DOCKERY	NONE	N/A	MEDICAL/DENTAL REHAB	
AMI DOCKERI	NONE	N/A	MEDICAL/DENIAL REARS	
MISSOULA, MT		 		1,465.
M.E. DOVE	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	
KALISPELL, MT 59901				1,528.
VELMA DUMONTIER	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	
CUT BANK, MT 59427			agott man 1, 22 viel	4,270.
TRAVIS ERICKSON	NONE	N/A	ASSISTIVE	
KALISPELL, MT 59901			EQUIPMENT/DEVICE	1,400.
MEGAN FREESTAD	NONE	N/A	CAPITAL	
MILES CITY, MT 59301			IMPROVEMENTS/EQUIPMENT	1,410.
Total from continuation sheets		- L		86,202.

Part XV Supplementary Information Grants and Contributions Paid During the Year (Continuation) If recipient is an individual, Foundation status of Purpose of grant or contribution show any relationship to Amount any foundation manager Name and address (home or business) recipient or substantial contributor BRIDGET HANNA NONE N/A HEARING MISSOULA, MT 59802 4,400. CRYSTAL HANSON NONE ASSISTIVE N/A EQUIPMENT/DEVICE MISSOULA, MT 2,500. HOMEWORD, INC. NONE PUBLIC CHARITY PURCHASE OF COMPUTERS 127 N. HIGGINS AVE. MISSOULA, MT 59802 2,500. NONE N/A ASSISTIVE BRYON LACEY EQUIPMENT/DEVICE 3,000. BUTTE, MT FREDERICK MACE NONE N/A HEARTNO 1,500. KALISPELL, MT BRENTON MAYS NONE N/A ASSISTIVE EQUIPMENT/DEVICE KALISPELL, MT 59901 2,914. TIFFANY METZLER NONE N/A MEDICAL/DENTAL REHAB BILLINGS, MT 59102 2,486. MISSOULA AGING SERVICES NONE PUBLIC CHARITY GENERAL SUPPORT OF 337 STEPHENS AVE. LOCAL PROGRAMS MISSOULA, MT 59801 2,000. MISSOULA YMCA NONE PUBLIC CHARITY GENERAL SUPPORT OF LOCAL PROGRAMS 3000 S. RUSSELL ST. MISSOULA, MT 59801 1,000. MONTANA VETERANS FOUNDATION NONE PUBLIC CHARITY GENERAL SUPPORT OF LOCAL PROGRAMS 1112 LESLIE AVE. HELENA, MT 59601 1,000. Total from continuation sheets

Part XV Supplementary Information Grants and Contributions Paid During the			· · · · · · · · · · · · · · · · · · ·	
	If recipient is an individual,			
Recipient Name and address (home or business)	show any relationship to any foundation manager or substantial contributor	Foundation status of	Purpose of grant or contribution	Amount
Name and address (nome of business)	or śubstantial contributor	recipient		
LITTLE PLUME MURRAY	NONE	N/A	PURCHASE OF PERSONAL	
MISSOULA, MT				1,000.
TY NILES	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	
DARBY, MT 59829		·		1,500
RAYMOND O'CONNOR	NONE	N/A	CAPITAL IMPROVEMENTS/EQUIPMENT	0.245
GREAT FALLS, MT				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	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	
MISSOULA, MT		 		2,800
LORI VELASQUEZ	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	
MISSOULA, MT	-	-		5,000.
NICOLE WHEELER	NONE	N/A	CAPITAL IMPROVEMENT/EQUIPMENT	
SOMERS, MT				1,183.
MICHAEL WOODS	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	0.000
BILLINGS, MT				2,000
HARRY WOOLSEY	NONE	N/A	ASSISTIVE EQUIPMENT/DEVICE	
RONAN, MT 59864				1,500

MARSHALL AND MARY BRONDUM SPECIAL ASSISTANCE FOUNDATION, INC.

36-3700887

Part XV Supplementary Information		· ·		
3 Grants and Contributions Paid During the Y	ear (Continuation)			
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation	Purpose of grant or contribution	Amount
Name and address (home or business)	or substantial contributor	status of recipient	Contribution	
MISCELLANEOUS INDIVIDUALS BELOW	NONE	N/A	MEDICAL, HOUSING, AND	
REPORTING THRESHOLD		1	OTHER FINANCIAL	
PO BOX 3106			ASSISTANCE TO INDIGENT	
MISSOULA, MT 59806			FAMILIES	23,513.
				· · · ·
		-		
	 			
	-			
				<u></u>
Total from continuation sheets				

2011 DEPRECIATION AND AMORTIZATION REPORT FORM 990-PF PAGE 1

990-PF

															_		
Current Year Deduction	100.	100.		ı									1				
Current Sec 179		0		1		1		1			,		-	1			
Accumulated Depreciation	548.	548.		,				4									
Basis For Depreciation	695.	695.		1									-				
Reduction In Basis		0						1									
Bus % Excl		1		,						1				_		1	
Unadjusted Cost Or Basis	695.	695		,				1		· .							
No No	16		ĺ	i i	 			ŧ		1		1			-	1	
Life	7.00	1	, i					!		1				<u> </u>		1	
Method						1	-			! !			 			1	
Date Acquired	090106SL			1		1				1	<u>i</u>	<u>1</u> ; ;	[1	
Description	OFFICE EQUIPMENT	I														:	
Asset No			i		 !]		 	. –	

(D) - Asset disposed

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

FORM 990-PF INTEREST ON SAVINGS	AND TEM	PORARY C	ASH 1	INVESTMENTS	STATEMENT	1
SOURCE					AMOUNT	
INTEREST INCOME				-		4.
TOTAL TO FORM 990-PF, PART I, LI	NE 3, CO.	LUMN A		:		4.
FORM 990-PF DIVIDENDS A	ND INTER	EST FROM	SECU	JRITIES	STATEMENT	2
SOURCE	GROSS	AMOUNT		PITAL GAINS DIVIDENDS	COLUMN (A)
DIVIDEND INCOME INTEREST INCOME	<u> </u>	183,475. 3,175.		133,718.	49,79	
TOTAL TO FM 990-PF, PART I, LN 4		186,650.		133,718.	52,9	32.
FORM 990-PF	OTHER I	NCOME			STATEMENT	3
DESCRIPTION		(A) REVENUE PER BOOK		(B) NET INVEST- MENT INCOME		
REFUNDS		7,5	972.	0	•	
TOTAL TO FORM 990-PF, PART I, LI	NE 11	7,	972.	0	•	
FORM 990-PF	ACCOUNTI	NG FEES			STATEMENT	4
	(A) PENSES R BOOKS	(B) NET INV MENT IN		(C) ADJUSTED NET INCOM		
ACCOUNTING FEES OTHER PROFESSIONAL FEES	15,000.	3	,750 0		11,2	50.
TO FORM 990-PF, PG 1, LN 16B	15,000.	3	,750	•	11,2	50.

FORM 990-PF	TAX	ES		STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITAI E PURPOSI	
EXCISE TAX	1,896.	0.			0.
TO FORM 990-PF, PG 1, LN 18	1,896.	0.			0.
FORM 990-PF	OTHER E	XPENSES		STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITAI E PURPOSI	
MISC CLERICAL SERVICES INSURANCE	1,460. 18,000. 961.	0.		1,09 18,00 90	
TO FORM 990-PF, PG 1, LN 23	20,421.	364.	-	20,0	57.
FORM 990-PF DEPRECIATION O	COST OR	HELD FOR INV		STATEMENT FAIR MARKI	7 ET
OFFICE EQUIPMENT	695.	648.	47.		<u></u>
TO 990-PF, PART II, LN 14	695.	648.	47		47.
FORM 990-PF	CORPORAT	'E STOCK		STATEMENT	8
DESCRIPTION		во	OOK VALUE	FAIR MARKE	Т
26,169 SH. THORNBURG INV IN 45,947 SH. WR ADVISORS ACCU 8,931 SH. WR ADVISORS BOND 42,878 SH. WR ADVISORS CONT 72,397 SH. WR ADIVSORS CORE 993 SH. WR ADVISORS GOVERNM 15,907 SH. WR ADVISORS HIGH	MULATIVE A A INENTAL INCOM INVESTMENT A ENT SECURITIE	IE A	509,515. 345,824. 55,893. 299,973. 431,124. 5,763. 124,617.	487,7 386,4 57,8 382,8 472,0 5,7 114,5	11. 75. 97. 27.

MARSHALL AND MARY BRONDUM SPECIA	AL ASSIST		36-3700887
2,898 SH. WR ADVISORS MUNICIPAL BO 47,985 SH. WR ADVISORS NEW CONCEPT 19,000 SH. WR ADVISORS SCIENCE AND 32,071 SH. WR ADVISORS VANGUARD A 5,773 SH. AMERICAN CENTURY INVESTOR 9,297 SH. AMERICAN CENTURY INVESTOR	IS A D TECHNOLOGY A MENTS SELECT	20,949. 378,850. 166,341. 263,353. 236,619. 225,633.	21,881. 498,562. 203,296. 302,753. 258,622. 264,778.
TOTAL TO FORM 990-PF, PART II, LII	NE 10B	3,064,454.	3,457,144.
FORM 990-PF CO	ORPORATE BONDS		STATEMENT 9
DESCRIPTION		BOOK VALUE	FAIR MARKET VALUE
50,000 GMAC SMART NOTES 6.35% 5/1	5/13	50,005.	49,797.
TOTAL TO FORM 990-PF, PART II, LI	NE 10C	50,005.	49,797.
FORM 990-PF	OTHER ASSETS		STATEMENT 10
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.

	LIST OF OFFICERS, D AND FOUNDATION MANA		STATI	EMENT	11
NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB		
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	E 6, PART VIII	0.	0.		0.
	ERAL EXPLANATION AND LINE REFERENCES	<u> </u>	STAT	EMENT	12
FORM/LINE IDENTIFIER	DESCRIPTI	ON/RETURN R	EFERENCE		
FORM 990-PF	AMENDED R	RETURN			

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.

-	RERAL EXPLANATION STATEMENT AND LINE REFERENCES	14
FORM/LINE IDENTIFIER	DESCRIPTION/RETURN REFERENCE	
PART V	QUALIFICATION FOR REDUCED TAX ON NE INVESTMENT INCOME	T

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.

		EXPLANATION INE REFERENC	CES	***		STATEM	MENT	16
FORM/LINE IDENTIFIER		DESCRI	PTIO	N/RETUI	RN I	REFERENCE		
PART VI		EXCISE	TAX	BASED	ON	INVESTMENT	INCC)ME
	GENERAL 1	EXPLANATION			-	STATEN	MENT	

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/RETUR	N REFERENCE	
PART X	MINIMUM INVESTMEN	T RETURN	

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 AMOU	NT	

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 EXP FORM AND LINE		STATEMENT	22
FORM/LINE IDENTIFIER		DESCRIPTION/RETURN	N REFERENCE	
PART XII		QUALIFYING DISTRIE	BUTIONS	
	GENERAL EXP	LANATION	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	N REFERENCE	
PART XIII	UNDISTRIBUTED INCO	UNDISTRIBUTED INCOME	

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.

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.

If you are filing for an Automatic 3-Month Extension, complete only Part I and check this box

OMB No. 1545-1709

ightharpoons

Form 8868 (Rev 1-2012)

 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 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 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 Name of exempt organization or other filer, see instructions Type or Employer identification number (EIN) or MARSHALL AND MARY BRONDUM print 36-3700887 SPECIAL ASSISTANCE FOUNDATION, File by the Number, street, and room or suite no. If a P.O. box, see instructions. Social security number (SSN) due date fo filing your PO BOX 3106 return See instructions 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) **Application** Application Return Return Is For Code Is For Code Form 990 01 Form 990-T (corporation) 07 Form 990-BL Form 1041-A 80 Form 990-EZ 01 Form 4720 09 Form 5227 Form 990-PF 04 10 Form 990-T (sec 401(a) or 408(a) trust) 05 Form 6069 11 Form 8870 Form 990-T (trust other than above) 06 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 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: ► L calendar year ► X tax year beginning APR 1, 2011 , and ending MAR 31, 2012 Final return Initial return If the tax year entered in line 1 is for less than 12 months, check reason: Change in accounting period If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any 1,896. nonrefundable credits. See instructions За If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and 600. estimated tax payments made. Include any prior year overpayment allowed as a credit 3b Balance due. Subtract line 3b from line 3a Include your payment with this form, if required, 1,296. by using EFTPS (Electronic Federal Tax Payment System) See instructions

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

For Privacy Act and Paperwork Reduction Act Notice, see Instructions.