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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

2011

For calendar year 2011, or tax year beginning 10-01-2011 , and ending 09-30-2012

G Check all that apply

☐ Initial return

☐ Initial return of a former public charity

☐ Final return

☐ Amended return

☐ Address change

☐ Name change

Name of foundation
BEYOND BORDERS FOUNDATION INC

% GURVENDRA SURI

Number and street (or P O box number if mail is not delivered to street address)
1231 GREENWAY DRIVE

Room/suite

City or town, state, and ZIP code
IRVING, TX 75038

A Employer identification number
52-2387044

B Telephone number (see page 10 of the instructions)
(469) 713-3660

C If exemption application is pending, check here ☐

D 1. Foreign organizations, check here ☐

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

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

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

H Check type of organization ☒ Section 501(c)(3) exempt private foundation

☐ Section 4947(a)(1) nonexempt charitable trust

☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, col. (c), line 16) ☒ \$ 3,140,642

J Accounting method ☒ Cash ☐ Accrual ☐ Other (specify) _____ (Part I, column (d) must be on cash basis.)

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see page 11 of the instructions))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
Revenue	1 Contributions, gifts, grants, etc , received (attach schedule)	0			
	2 Check ☒ if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments	2,045	2,045		
	4 Dividends and interest from securities.	40,237	40,237		
	5a Gross rents				
	b Net rental income or (loss) _____				
	6a Net gain or (loss) from sale of assets not on line 10	51,753			
	b Gross sales price for all assets on line 6a _____ 1,292,101				
	7 Capital gain net income (from Part IV, line 2)		51,753		
	8 Net short-term capital gain				
	9 Income modifications				
	10a Gross sales less returns and allowances				
Operating and Administrative Expenses	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	94,035	94,035		
	13 Compensation of officers, directors, trustees, etc	0			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule).				
	b Accounting fees (attach schedule).				
	c Other professional fees (attach schedule)				
	17 Interest				
	18 Taxes (attach schedule) (see page 14 of the instructions)	2,306			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule).	6,691	5,178		450
	24 Total operating and administrative expenses.				
	Add lines 13 through 23	8,997	5,178		450
	25 Contributions, gifts, grants paid.	113,000			113,000
	26 Total expenses and disbursements. Add lines 24 and 25	121,997	5,178		113,450
	27 Subtract line 26 from line 12				
	a Excess of revenue over expenses and disbursements	-27,962			
	b Net investment income (if negative, enter -0-)		88,857		
	c Adjusted net income (if negative, enter -0-)				

Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)	Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash—non-interest-bearing			
	2	Savings and temporary cash investments	1,246,073	1,625,546	1,625,546
	3	Accounts receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	4	Pledges receivable ▶ _____ Less allowance for doubtful accounts ▶ _____			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see page 15 of the instructions)			
	7	Other notes and loans receivable (attach schedule) ▶ _____ Less allowance for doubtful accounts ▶ _____			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges	9	2,308	2,308
	10a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)			
	c	Investments—corporate bonds (attach schedule)			
	11	Investments—land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)	1,890,741	1,481,007	1,509,788
	14	Land, buildings, and equipment basis ▶ _____ Less accumulated depreciation (attach schedule) ▶ _____			
Liabilities	15	Other assets (describe ▶ _____)	3,000	3,000	3,000
	16	Total assets (to be completed by all filers—see the instructions Also, see page 1, item I)	3,139,823	3,111,861	3,140,642
	17	Accounts payable and accrued expenses			
	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 (attach schedule)			
	22	Other liabilities (describe ▶ _____)			
	23	Total liabilities (add lines 17 through 22)		0	
		Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ 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	3,139,823	3,111,861	
	30	Total net assets or fund balances (see page 17 of the instructions)	3,139,823	3,111,861	
	31	Total liabilities and net assets/fund balances (see page 17 of the instructions)	3,139,823	3,111,861	

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 3,139,823
2	Enter amount from Part I, line 27a	2 -27,962
3	Other increases not included in line 2 (itemize) ▶ _____	3
4	Add lines 1, 2, and 3	4 3,111,861
5	Decreases not included in line 2 (itemize) ▶ _____	5
6	Total net assets or fund balances at end of year (line 4 minus line 5)—Part II, column (b), line 30	6 3,111,861

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)		(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Additional Data Table			
b				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a See Additional Data Table			
b			
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 See Additional Data Table			
b			
c			
d			
e			

2	Capital gain net income or (net capital loss)	{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }	2	51,753
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) (see pages 13 and 17 of the instructions) If (loss), enter -0- in Part I, line 8		3	

Part V Qualification Under Section 4940(e) for Reduced Tax on Net Investment Income

(For optional use by domestic private foundations subject to the section 4940(a) tax on net investment income)

If section 4940(d)(2) applies, leave this part blank

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period? ☐ Yes ☒ No

If "Yes," the foundation does not qualify under section 4940(e) Do not complete this part

1 Enter the appropriate amount in each column for each year, see page 18 of the 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	77,095	3,146,946	0 024498
2009	121,378	2,976,380	0 04078
2008	54,635	2,636,610	0 020722
2007	79,204	1,045,522	0 075755
2006			

2	Total of line 1, column (d).	2	0 161755
3	Average distribution ratio for the 5-year base period—divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0 040439
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5.	4	3,077,497
5	Multiply line 4 by line 3.	5	124,451
6	Enter 1% of net investment income (1% of Part I, line 27b).	6	889
7	Add lines 5 and 6.	7	125,340
8	Enter qualifying distributions from Part XII, line 4.	8	113,450

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 on page 18

Part VIExcise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948—see page 18 of the instructions)

1a		Exempt operating foundations described in section 4940(d)(2), check here ☐ and enter "N/A" on line 1			
		Date of ruling or determination letter _____ (attach copy of letter if necessary—see instructions)			
b		Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	1,777
c		All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, col (b)			
2		Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	
3		Add lines 1 and 2.		3	1,777
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	1,777
6		Credits/Payments			
a		2011 estimated tax payments and 2010 overpayment credited to 2011	6a	2,308	
b		Exempt foreign organizations—tax withheld at source	6b		
c		Tax paid with application for extension of time to file (Form 8868)	6c	445	
d		Backup withholding erroneously withheld	6d		
7		Total credits and payments Add lines 6a through 6d.		7	2,753
8		Enter any penalty for underpayment of estimated tax Check here ☐ if Form 2220 is attached		8	16
9		Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed		9	
10		Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid.		10	960
11		Enter the amount of line 10 to be Credited to 2012 estimated tax 960	Refunded	11	

Part VII-AStatements Regarding Activities

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? ☒		Yes	No
		1a		No
b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see page 19 of the instructions for definition)?	1b		No
If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.				
c	Did the foundation file Form 1120-POL for this year?	1c		No
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation \$ (2) On foundation managers \$			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers \$			
2	Has the foundation engaged in any activities that have not previously been reported to the IRS?	2		No
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 bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes ☒	3		No
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year?	4a		No
b	If "Yes," has it filed a tax return on Form 990-T for this year?	4b		
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year?	5		No
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 remain in the governing instrument?	6	Yes	
7	Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	7	Yes	
8a	Enter the states to which the foundation reports or with which it is registered (see page 19 of the instructions) TX			
b	If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation .	8b	Yes	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV on page 27)? If "Yes," complete Part XIV	9		No
10	Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses	10		No

Part VII-A

Statements Regarding Activities *(continued)*

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see page 20 of the instructions).	11		No
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		No
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address  N/A	13	Yes	
14	The books are in care of  GURVENDRA SURI Telephone no  (469) 713-3660 Located at  1231 GREENWAY DRIVE STE 900 IRVING TX ZIP +4  75038			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 —Check here  and enter the amount of tax-exempt interest received or accrued during the year.	15		
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes", enter the name of the foreign country 				

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.			Yes	No
1a	During the year did the foundation (either directly or indirectly) (1) Engage in the sale or exchange, or leasing of property with a disqualified person?  Yes  No (2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?.  Yes  No (3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?  Yes  No (4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?  Yes  No (5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?.  Yes  No (6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days).  Yes  No			
b	If any answer is "Yes" to 1a(1)–(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)?. Organizations relying on a current notice regarding disaster assistance check here. 	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		No
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  20____, 20____, 20____, 20____  Yes  No			
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 page 20 of the instructions).	2b		No
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here  20____, 20____, 20____, 20____			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?.  Yes  No			
b	If "Yes," did it have excess business holdings in 2011 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (<i>Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011.</i>).	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a		No
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?	4b		No

Part VII-B

Statements Regarding Activities for Which Form 4720 May Be Required (continued)

5a	During the year did the foundation pay or incur any amount to			
	(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?	☐ 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)? (see page 22 of the instructions).	☐ 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 page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here.	☒	5b	
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? <i>If "Yes," attach the statement required by Regulations section 53.4945–5(d).</i>	☐ Yes ☐ No		
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? <i>If "Yes" to 6b, file Form 8870.</i>		6b	No
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?		7b	

Part VIII

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

1 List all officers, directors, trustees, foundation managers and their compensation (see page 22 of the instructions).				
(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
Bandana Kaur	Director	0	0	0
3 Lorenzo Irvine, CA 92614	1 0			
Gurvendra Suri	President	0	0	0
1231 GREENWAY DR STE 900 Irving, TX 75038	2 0			
Manjeet Sun	Secretary	0	0	0
1231 GREENWAY DR STE 900 Irving, TX 75038	2 0			
2 Compensation of five highest-paid employees (other than those included on line 1—see page 23 of the instructions). If none, enter "NONE."				
(a) Name and address of each employee paid more than \$50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
Total number of other employees paid over \$50,000.				

Part VIII

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation

Part IX-A Summary of Direct Charitable Activities

1	
2	
3	
4	

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 page 24 of the instructions	
3	

Form **990-PF** (2011)

Part X

Minimum Investment Return (All domestic foundations must complete this part. Foreign foundations, see page 24 of the 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	1,646,697
b	Average of monthly cash balances.	1b	1,477,665
c	Fair market value of all other assets (see page 24 of the instructions).	1c	0
d	Total (add lines 1a, b, and c).	1d	3,124,362
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation).	1e	
2	Acquisition indebtedness applicable to line 1 assets.	2	0
3	Subtract line 2 from line 1d.	3	3,124,362
4	Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see page 25 of the instructions).	4	46,865
5	Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	3,077,497
6	Minimum investment return. Enter 5% of line 5.	6	153,875

Part XI

Distributable Amount (see page 25 of the 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	153,875
2a	Tax on investment income for 2011 from Part VI, line 5.	2a	1,777
b	Income tax for 2011 (This does not include the tax from Part VI).	2b	
c	Add lines 2a and 2b.	2c	1,777
3	Distributable amount before adjustments Subtract line 2c from line 1.	3	152,098
4	Recoveries of amounts treated as qualifying distributions.	4	
5	Add lines 3 and 4.	5	152,098
6	Deduction from distributable amount (see page 25 of the instructions).	6	
7	Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1.	7	152,098

Part XII

Qualifying Distributions (see page 25 of the 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	113,450
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	0
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required).	3a	0
b	Cash distribution test (attach the required schedule).	3b	0
4	Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	113,450
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see page 26 of the instructions).	5	
6	Adjusted qualifying distributions. Subtract line 5 from line 4.	6	113,450
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 page 26 of the instructions)

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				152,098
2 Undistributed income, if any, as of the end of 2011				
a Enter amount for 2010 only.			104,425	
b Total for prior years 2009 , 2008 , 2007				
3 Excess distributions carryover, if any, to 2011				
a From 2006.				
b From 2007.				
c From 2008.				
d From 2009.				
e From 2010.				0
f Total of lines 3a through e.	0			
4 Qualifying distributions for 2011 from Part XII, line 4 ▶ \$ 113,450				
a Applied to 2010, but not more than line 2a			104,425	
b Applied to undistributed income of prior years (Election required—see page 26 of the instructions)				
c Treated as distributions out of corpus (Election required—see page 26 of the instructions). . .				
d Applied to 2011 distributable amount.				9,025
e Remaining amount distributed out of corpus	0			
5 Excess distributions carryover applied to 2011 (If an amount appears in column (d), the same amount must be shown in column (a).)	0			0
6 Enter the net total of each column as indicated below:	0			
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b.				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed.				
d Subtract line 6c from line 6b Taxable amount—see page 27 of the instructions . . .				
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount—see page 27 of the instructions				
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011.				143,073
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see page 27 of the instructions).				
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see page 27 of the instructions).				
9 Excess distributions carryover to 2012. Subtract lines 7 and 8 from line 6a.	0			
10 Analysis of line 9				
a Excess from 2007. . . .				
b Excess from 2008. . . .				
c Excess from 2009. . . .				
d Excess from 2010. . . .				
e Excess from 2011. . . .	0			

Part XIV

Private Operating Foundations (see page 27 of the instructions and Part VII-A, question 9)

1a

If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling.

b

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

☐ 4942(j)(3) ☐ 4942(j)(5)

2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed.	Tax year	Prior 3 years			(e) Total
		(a) 2011	(b) 2010	(c) 2009	(d) 2008	
b	85% of line 2a					
c	Qualifying distributions from Part XII, line 4 for each year listed.					
d	Amounts included in line 2c not used directly for active conduct of exempt activities.					
e	Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c.					
3	Complete 3a, b, or c for the alternative test relied upon					
a	"Assets" alternative test—enter					
	(1) Value of all assets					
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b	"Endowment" alternative test— enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed.					
c	"Support" alternative test—enter					
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties).					
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii).					
	(3) Largest amount of support from an exempt organization					
	(4) Gross investment income					

Part XV

Supplementary Information (Complete this part only if the organization had \$5,000 or more in assets at any time during the year—see page 27 of the 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 page 28 of the 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

Gurvendra S Suri
1803 Larkspur Ct
Southlake, TX 76092
(469) 713-3660

b

The form in which applications should be submitted and information and materials they should include

THERE IS NO SPECIFIC FORM REQUIRED. THE APPLICANTS ARE ADVISED TO SUBMIT THEIR REQUESTS IN A MANNER THAT PRESENTS THEIR FACTS AND CIRCUMSTANCES IN THE BEST POSSIBLE WAY.

c

Any submission deadlines

THERE ARE NO DEADLINES FOR THE SUBMISSION OF APPLICATIONS.

d

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

THERE ARE NO LIMITATIONS OR RESTRICTIONS ON AWARDS.

Part XV

Supplementary Information (continued)

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

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year See Additional Data Table				
Total			3a	113,000
b Approved for future payment				
Total			3b	

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See page 28 of the instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a _____					
b _____					
c _____					
d _____					
e _____					
f _____					
g Fees and contracts from government agencies					
2 Membership dues and assessments.					
3 Interest on savings and temporary cash investments			14	2,045	
4 Dividends and interest from securities.			14	40,237	
5 Net rental income or (loss) from real estate					
a Debt-financed property.					
b Not debt-financed property.					
6 Net rental income or (loss) from personal property					
7 Other investment income.					
8 Gain or (loss) from sales of assets other than inventory			18	51,753	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory. . .					
11 Other revenue a _____					
b _____					
c _____					
d _____					
e _____					
12 Subtotal. Add columns (b), (d), and (e). . .				94,035	
13 Total. Add line 12, columns (b), (d), and (e).			13		94,035

[illegible]

Part XVII

1 Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations?		Yes	No
a Transfers from the reporting foundation to a noncharitable exempt organization of			
(1) Cash.			No
(2) Other assets.			No
b Other transactions			
(1) Sales of assets to a noncharitable exempt organization.			No
(2) Purchases of assets from a noncharitable exempt organization.			No
(3) Rental of facilities, equipment, or other assets.			No
(4) Reimbursement arrangements.			No
(5) Loans or loan guarantees.			No
(6) Performance of services or membership or fundraising solicitations.			No
c Sharing of facilities, equipment, mailing lists, other assets, or paid employees.			No
d If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received			

[illegible]

2a Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No

b If "Yes," complete the following schedule		(a) Name of organization	(b) Type of organization	(c) Description of relationship
Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge				
***** Signature of officer or trustee			2013-08-15 Date	***** Title
Paid Preparer's Use Only	Preparer's Signature	Matthew D Peck		Date
	Firm's name	LANE GORMAN TRUBITT PLLC 2626 HOWELL STREET SUITE 700		Check if self-employed ☒
	Firm's address	DALLAS, TX 752044064		PTIN Firm's EIN Phone no (214) 871-7500

May the IRS discuss this return with the preparer shown above? See instructions ☒ Yes ☐ No

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns a - d

(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)
300,000 SHS GS MARKET PLUS SPX	P		2012-02-07
100,000 SHS HSBC MARKET PLUS SPX	P		2012-04-02
100,000 SHS JPM CONT BUFF EQ	P		2012-05-31
100,000 SHS JPM GSCI BRENT CRUDE CPN NTE	P		2012-06-07
100,000 SHS JPM CONT BUFF EQ GE	P		2012-07-11
3,600 SHS JPM CHASE CAPITAL XXVIII	P		2012-07-12
1260 598 SHS RYDEX/SGI MANAGED FUT STR A	P	2010-05-04	2011-10-19
1179 SHS BARCLAYS BK PLC	P	2010-11-19	2012-02-22
649 SHS WISDMTREE MNGED FTURES	P	2011-10-19	2012-02-22
SEE ATTACHMENT A	P		
SEE ATTACHMENT A	P		

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns e - h

(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)
360,639		300,000	60,639
109,150		100,000	9,150
63,737		100,000	-36,263
110,000		100,000	10,000
111,297		100,000	11,297
90,000		90,000	
30,582		32,158	-1,576
51,922		51,735	187
28,391		30,347	-1,956
66,327		67,335	-1,008
270,056		268,773	1,283

Form 990PF Part IV - Capital Gains and Losses for Tax on Investment Income - Columns i - l

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	
			60,639
			9,150
			-36,263
			10,000
			11,297
			-1,576
			187
			-1,956
			-1,008
			1,283

Form 990PF Part XV Line 3 - Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
The Cyber Sikh Organization23800 Via Del Rio Yorba Linda, CA 92887	NONE	PUBLIC CHARITY	GENERAL OPERATIONS	2,000
The Kalgidhar TrustPO BOX 261089 PLANO, TX 75026	NONE	PUBLIC CHARITY	GENERAL OPERATIONS	2,500
ENSAAF IncPO Box 11682 PLEASANTON, CA 94588	NONE	Public charity	general operations	13,636
The Sikh Coalition40 Exchange Place Ste 728 New York, NY 10005	NONE	PUBLIC CHARITY	GENERAL OPERATIONS	18,182
Sikh Human Development Foundation Inc (SHDF)15129 Winesap Drive North Potomac, MD 20878	none	Public Charity	General Operations	32,727
Sikh American Legal Defense and Education FundSALDEF 1012 14TH STREET NW STE 450 WASHINGTON, DC 20005	None	Public Charity	General Operations	9,091
Alzheimer's Association2242 W Holcombe Blvd Houston, TX 77030	none	Public Charity	General Operations	1,000
Newport Irvine Rotary ClubPO Box 4113 Irvine, CA 92616	none	Public Charity	General Operations	1,000
Komen Maryland Race for the Cure 200 East Joppa Rd Ste 407 Towson, MD 21286	none	Public Charity	General Operations	1,000
Gurdwara Singh Sabha1201 Abrams Road Richardson, TX 75081	none	RELIGIOUS	General Operations	3,000
Jakara Movement2491 Alluvial Ave Ste 1 Clovis, CA 93611	none	PUBLIC CHARITY	General Operations	1,364
Baylor Healthcare System Foundation 3500 Gaston Avenue Dallas, TX 75246	none	PUBLIC CHARITY	General Operations	10,000
American Heart Association7272 GREENVILLE AVENUE DALLAS, TX 75231	none	PUBLIC CHARITY	General Operations	3,000
Children's Advocacy Center of Collin County2205 LOS RIOS BLVD PLANO, TX 75074	none	PUBLIC CHARITY	General Operations	2,500
Sikh Spirit Foundation6002 Camp Bullis Road San Antonio, TX 78257	none	Public Charity	General Operations	10,000
Miriam's Kitchen2401 Virginia Avenue NW Washington, DC 20037	None	Public Charity	General Operations	2,000
Total  3a				113,000

**TY 2011 All Other Program
Related Investments Schedule**

Name: BEYOND BORDERS FOUNDATION INC
EIN: 52-2387044

Category	Amount
N/A	

Note: To capture the full content of this document, please select landscape mode (11" x 8.5") when printing.

TY 2011 Depreciation Schedule

Name: BEYOND BORDERS FOUNDATION INC

EIN: 52-2387044

TY 2011 Investments - Other Schedule**Name:** BEYOND BORDERS FOUNDATION INC**EIN:** 52-2387044

Category/ Item	Listed at Cost or FMV	Book Value	End of Year Fair Market Value
MORGAN STANLEY MUTUAL FUNDS	AT COST		
JPM CHASE CAPITAL XXVIII	AT COST		
JPMORGAN US LARGE CAP EQUITY	AT COST	0	0
JPMORGAN CONCENTRATED & OTHER	AT COST	0	0
JPMORGAN EURO LARGE CAP EQUITY	AT COST	150,000	150,827
JPMORGAN ALTERNATIVE ASSETS	AT COST	100,000	101,740
JPMORGAN COMPLEMENTARY	AT COST	100,000	107,568
MERRILL LYNCH EQUITY, MUTUAL			
FUNDS, & ALTERNATIVE ASSETS	AT COST	1,131,007	1,149,653

TY 2011 Land, Etc. Schedule**Name:** BEYOND BORDERS FOUNDATION INC**EIN:** 52-2387044

TY 2011 Other Assets Schedule

Name: BEYOND BORDERS FOUNDATION INC

EIN: 52-2387044

Description	Beginning of Year - Book Value	End of Year - Book Value	End of Year - Fair Market Value
OTHER RECEIVABLE	3,000	3,000	3,000

TY 2011 Other Expenses Schedule**Name:** BEYOND BORDERS FOUNDATION INC**EIN:** 52-2387044

Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
TAX PENALTIES	63			
BANK FEES	130			130
INVESTMENT FEES	5,178	5,178		
MISCELLANEOUS	1,320			320

TY 2011 Taxes Schedule

Name: BEYOND BORDERS FOUNDATION INC

EIN: 52-2387044

Category	Amount	Net Investment Income	Adjusted Net Income	Disbursements for Charitable Purposes
FEDERAL INCOME TAXES	2,306			

BEYOND BORDERS FOUNDATION, INC. EIN: 52-2387044
ATTACHMENT A - REALIZED GAINS/LOSSES

ABS RTN

Account Number: 425-02219

24-Hour Assistance: (800) MERRILL

YOUR EMA TRANSACTIONS

August 01, 2012 - August 31, 2012

SECURITY TRANSACTIONS (continued)

TRANSACTIONS CONDUCTED PER THE APPLICABLE WRITTEN AGREEMENT

Settlement Date	Trade Date	Description	Transaction Type	Quantity	Unit Price	Debit	Credit	Accrued Interest Earned/(Paid)
08/23	08/20	WISDOMTREE EMERGING MARKETS LOCAL DEBT EXECUTED 100% AGENCY PRICE SHOWN IS AVERAGE PRICE DETAILS REGARDING ACTUAL PRICES, REMUNERATION AND THE CAPACITY IN WHICH ML ACTED ARE AVAILABLE UPON REQUEST ML ACTED AS AGENT CUS NO 97717X867 SEC NO 39N67 PRINCIPAL 30625 46 TRN FEE 0 69	Sale	-596	51 3850		30,624 77	
		<i>Subtotal (Sales)</i>					336,382 54	
		TOTAL				367,064.33	336,382.54	

REALIZED GAINS/(LOSSES)

Description	Quantity	Acquired Date	Liquidation Date	Sale Amount	Cost Basis	This Statement	Gains/(Losses) * Year to Date
ISHARES S&P SMALLCAP 600	2 0000	01/14/11	08/20/12	150 87	139 42		11 45
VANGUARD REIT ETF	62 0000	11/19/10	08/20/12	4,086 02	3,273 60		812 42
VANGUARD MSCI EMERGING	667 0000	11/19/10	08/20/12	27,427 90	31,349 00	(3,921 10)	
FIRST TR LARGE CAP VALUE	1514 0000	05/31/11	08/20/12	44,536 04	44,102 82		433 22
ISHARES S&P 500	49 0000	11/19/10	08/20/12	3,766 06	3,093 37		672 69
WISDOMTREE EMERGING	596 0000	11/19/10	08/20/12	30,624 77	31,307 88	(683 11)	
FID ADV FLT RAT HI INC I	1052 0000	05/04/10	08/20/12	10,372 72	10,152 10		220 62
FIDELITY ADV FLOATING	1790	05/04/10	08/20/12	1 76	1 72		04
DOUBLELINE CR FXD IN I	712 0000	03/18/11	08/20/12	8,045 60	7,497 36		548 24
DOUBLELINE CORE FIXED	4820	03/18/11	08/20/12	5 44	5 07		37
METRO W TTL RTRN BD CL I	1212 0000	05/04/10	08/20/12	13,113 84	12,544 20		569 64
METROPOLITAN WEST TOTAL	1090	05/04/10	08/20/12	1 17	1 12		05
OPPENHMR DEV MRKTS CL Y	2450	06/04/10	08/20/12	7 90	6 65		1 25

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66 of 118

ABS RTN

Account Number. 425-02219

YOUR EMA TRANSACTIONS

August 01, 2012 - August 31, 2012

REALIZED GAINS/(LOSSES) (continued)

Description	Quantity	Acquired Date	Liquidation Date	Sale Amount	Cost Basis	Gains/(Losses) *	
						This Statement	Year to Date
OPPENHMR DEV MRKTS CL Y	606 0000	06/04/10	08/20/12	19,549 55	16,457 00	3,092 55	
OPPENHMR DEV MRKTS CL Y	1 0000	12/21/10	08/20/12	32 27	30 65	1 62	
JP MORGAN STRATEGIC	7840 0000	05/04/10	08/20/12	91,492 79	92,202 09	(709 30)	
JP MORGAN STRATEGIC	1 0000	05/28/10	08/20/12	11 67	11 73	(06)	
JP MORGAN STRATEGIC	17 0000	05/28/10	08/20/12	198 39	197 09	1 30	
JP MORGAN STRATEGIC	19 0000	06/30/10	08/20/12	221 73	219 84	1 89	
JP MORGAN STRATEGIC	1 0000	07/30/10	08/20/12	11 67	11 60	07	
JP MORGAN STRATEGIC	21 0000	07/30/10	08/20/12	245 07	244 63	.44	
JP MORGAN STRATEGIC	22 0000	08/31/10	08/20/12	256 74	255 66	1 08	
JP MORGAN STRATEGIC	1 0000	09/30/10	08/20/12	11 67	11 67	00	
JP MORGAN STRATEGIC	21 0000	09/30/10	08/20/12	245 07	246 12	(1 05)	
JP MORGAN STRATEGIC	21 0000	10/29/10	08/20/12	245 07	247 99	(2 92)	
JP MORGAN STRATEGIC	23 0000	11/30/10	08/20/12	268 41	270 04	(1 63)	
JP MORGAN STRATEGIC	1 0000	12/14/10	08/20/12	11 67	11 76	(09)	
JP MORGAN STRATEGIC	7 0000	12/14/10	08/20/12	81 69	82 52	(83)	
JP MORGAN STRATEGIC	21 0000	12/31/10	08/20/12	245 07	248 42	(3 35)	
JP MORGAN STRATEGIC	1 0000	01/31/11	08/20/12	11 67	11 85	(18)	
JP MORGAN STRATEGIC	16 0000	01/31/11	08/20/12	186 72	190 87	(4 15)	
JP MORGAN STRATEGIC	1 0000	02/28/11	08/20/12	11 67	11 97	(30)	
JP MORGAN STRATEGIC	15 0000	02/28/11	08/20/12	175 05	180 30	(5 25)	
JP MORGAN STRATEGIC	15 0000	03/31/11	08/20/12	175 05	179 71	(4 66)	
JP MORGAN STRATEGIC	14 0000	04/29/11	08/20/12	163 38	168 43	(5 05)	
JP MORGAN STRATEGIC	1 0000	05/31/11	08/20/12	11 67	12 00	(33)	
JP MORGAN STRATEGIC	13 0000	05/31/11	08/20/12	151 71	155 75	(4 04)	
JP MORGAN STRATEGIC	1 0000	06/30/11	08/20/12	11 67	11 98	(31)	
JP MORGAN STRATEGIC	12 0000	06/30/11	08/20/12	140 04	143 08	(3 04)	
JP MORGAN STRATEGIC	1 0000	07/29/11	08/20/12	11 67	11 92	(25)	
JP MORGAN STRATEGIC	15 0000	07/29/11	08/20/12	175 05	177 51	(2 46)	
JP MORGAN STRATEGIC	0022	N/A	08/20/12	02	N/A	N/A	
PERMANENT PORTFOLIO FUND	284 0000	03/18/11	08/20/12	13,543 96	13,277 00	266 96	

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ABS RTN

Account Number 425-02219

24-Hour Assistance: (800) MERRILL

YOUR EMA TRANSACTIONS

August 01, 2012 - August 31, 2012

REALIZED GAINS/(LOSSES) (continued)

Description	Quantity	Acquired Date	Liquidation Date	Sale Amount	Cost Basis	Gains/(Losses) *	
						This Statement	Year to Date
PERMANENT PORTFOLIO FUND	0580	03/18/11	08/20/12	2 76	2 71	05	
PERMANENT PORTFOLIO FUND	3160	03/18/11	08/20/12	15 07	14 77	30	
<i>Subtotal (Long-Term)</i>						1,282 79	1,470 50
SPDR BARCLY CAPTL 1-3 MO	821 0000	09/22/11	08/20/12	37,617 38	37,642 85	(25 47)	
PIMCO COMM RR STR CL P	2920	02/22/12	08/20/12	1 99	2 06	(07)	
PIMCO COMM RR STR CL P	4125 0000	02/22/12	08/20/12	28,132 50	29,122 50	(990 00)	
PIMCO COMMODITY REAL	2810	02/22/12	08/20/12	1 91	1 98	(07)	
FID ADV FLT RAT HI INC I	3550	10/31/11	08/20/12	3 50	3 46	04	
DOUBLELINE CR FXD IN I	2700	10/31/11	08/20/12	3 05	2 95	10	
METRO W TTL RTRN BD CL I	4280	10/31/11	08/20/12	4 63	4 48	15	
JP MORGAN STRATEGIC	14 0000	08/31/11	08/20/12	163 38	162 48	90	
JP MORGAN STRATEGIC	1 0000	09/30/11	08/20/12	11 67	11 59	08	
JP MORGAN STRATEGIC	13 0000	09/30/11	08/20/12	151 71	147 37	4 34	
JP MORGAN STRATEGIC	19 0000	10/31/11	08/20/12	221 73	220 16	1 57	
JP MORGAN STRATEGIC	1 0000	10/31/11	08/20/12	11 68	11 56	12	
JP MORGAN STRATEGIC	1348	10/31/11	08/20/12	1 58	1 53	05	
<i>Subtotal (Short-Term)</i>						(1,008 26)	(2,964 27)
TOTAL				336,382.49	336,107.94	274 53	(1,493.77)

* - Excludes transactions for which we have insufficient data

N/A - Results which cannot be calculated because of insufficient data are reflected by an N/A entry in the capital gain or (loss) column and are not included in the realized capital gain and loss summary

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