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**Return of Private Foundation**  
 or Section 4947(a)(1) Nonexempt Charitable Trust  
 Treated as a Private Foundation

OMB No 1545-0052

2012

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

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

For calendar year 2012 or tax year beginning , 2012, and ending , 20

Name of foundation

HARVEY SAMUELSEN SCHOLARSHIP TRUST

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

Room/suite

P.O. BOX 1464

City or town, state, and ZIP code

DILLINGHAM, AK 99576-1464

G Check all that apply:

Initial return  
 Final return  
 Address change

Initial return of a former public charity  
 Amended return  
 Name change

A Employer identification number

30-0065137

B Telephone number (see instructions)

(907) 842-4370

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) ► \$ 9,749,301. J Accounting method:  Cash  Accrual  
 Other (specify) (Part I, column (d) must be on cash basis.)

		(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)	411,312.	ATCH 1		
	2 Check ► <input type="checkbox"/> if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	291,345.	291,345.		ATCH 2
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	352,167.			
	b Gross sales price for all assets on line 6a	5,950,104.			
	7 Capital gain net income (from Part IV, line 2)		352,167.		
	8 Net short-term capital gain				
	9 Income modifications			25,550.	
	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit or (loss) (attach schedule)				
	11 Other income (attach schedule) ATCH 3	2,365.	39.	RE 2,326.	ED
	12 Total. Add lines 1 through 11	1,057,189.	643,551.	RE 271,876.	ED
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	9,500.	4,750.		4,750.
	14 Other employee salaries and wages	25,105.			25,181.
	15 Pension plans, employee benefits	6,769.			6,783.
	16a Legal fees (attach schedule) ATCH 4	70.			70.
	b Accounting fees (attach schedule) ATCH 5	7,400.			7,400.
	c Other professional fees (attach schedule) *	58,382.	58,382.		
	17 Interest				
	18 Taxes (attach schedule) (see instructions) ATCH 7	5,695.			
	19 Depreciation (attach schedule) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings	8,499.	4,250.		4,272.
	22 Printing and publications				
	23 Other expenses (attach schedule) ATCH 8.	73,109.	6,486.		66,518.
	24 Total operating and administrative expenses.	194,529.	73,868.		114,974.
	Add lines 13 through 23	370,460.			396,100.
	25 Contributions, gifts, grants paid	564,989.	73,868.		511,074.
	26 Total expenses and disbursements Add lines 24 and 25				
	27 Subtract line 26 from line 12	492,200.			
	a Excess of revenue over expenses and disbursements				
	b Net investment income (if negative, enter -0-)		569,683.		
	c Adjusted net income (if negative, enter -0-)			27,876.	

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<b>Part II Balance Sheets</b>		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
<b>Assets</b>				
1	Cash - non-interest-bearing . . . . .			
2	Savings and temporary cash investments . . . . .	332,469.	361,898.	361,898.
3	Accounts receivable ► 8,850.	8,760.	8,850.	8,850.
	Less allowance for doubtful accounts ►			
4	Pledges receivable ►			
	Less allowance for doubtful accounts ►			
5	Grants receivable . . . . .			
6	Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions) . . . . .			
7	Other notes and loans receivable (attach schedule) ►			
	Less allowance for doubtful accounts ►			
8	Inventories for sale or use . . . . .			
9	Prepaid expenses and deferred charges . . . . . ATCH 9	15,346.	7,461.	7,461.
10 a	Investments - U S and state government obligations (attach schedule).**	1,007,564.	1,112,862.	1,112,862.
b	Investments - corporate stock (attach schedule) ATCH 11	6,148,585.	7,092,891.	7,092,891.
c	Investments - corporate bonds (attach schedule) ATCH 12	1,019,338.	1,042,871.	1,042,871.
11	Investments - land, buildings, and equipment basis ►			
	Less accumulated depreciation ► (attach schedule)			
12	Investments - mortgage loans . . . . .			
13	Investments - other (attach schedule) . . . . . ATCH 13	146,025.	107,138.	107,138.
14	Land, buildings, and equipment basis ►			
	Less accumulated depreciation ► (attach schedule)			
15	Other assets (describe ► ATCH 14 )	18,574.	15,330.	15,330.
16	<b>Total assets</b> (to be completed by all filers - see the instructions Also, see page 1, item I) . . . . .	8,696,661.	9,749,301.	9,749,301.
<b>Liabilities</b>				
17	Accounts payable and accrued expenses . . . . .	9,161.	11,303.	
18	Grants payable . . . . .			
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 ► ATCH 15 )	114,065.	92,173.	
23	<b>Total liabilities</b> (add lines 17 through 22) . . . . .	123,226.	103,476.	
<b>Net Assets or Fund Balances</b>				
	<b>Foundations that follow SFAS 117, check here ► <input checked="" type="checkbox"/> and complete lines 24 through 26 and lines 30 and 31.</b>			
24	Unrestricted . . . . .	8,573,435.	9,645,825.	
25	Temporarily restricted . . . . .			
26	Permanently restricted . . . . .			
	<b>Foundations that do not follow SFAS 117, check here and complete lines 27 through 31. ► <input type="checkbox"/></b>			
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 . . . . .			
30	<b>Total net assets or fund balances</b> (see instructions) . . . . .	8,573,435.	9,645,825.	
31	<b>Total liabilities and net assets/fund balances</b> (see instructions) . . . . .	8,696,661.	9,749,301.	

**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	8,573,435.
2	Enter amount from Part I, line 27a . . . . .	2	492,200.
3	Other increases not included in line 2 (itemize) ► ATCH 16	3	580,190.
4	Add lines 1, 2, and 3 . . . . .	4	9,645,825.
5	Decreases not included in line 2 (itemize) ►	5	
6	<b>Total net assets or fund balances at end of year</b> (line 4 minus line 5) - Part II, column (b), line 30 . . . . .	6	9,645,825.

\*\*ATCH 10

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**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.)
<b>1a SEE PART IV SCHEDULE</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>(e) Gross sales price</b>		<b>(f) Depreciation allowed (or allowable)</b>	<b>(g) Cost or other basis plus expense of sale</b>	<b>(h) Gain or (loss) (e) plus (f) minus (g)</b>	
<b>a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69</b>				<b>(I) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))</b>	
<b>(I) F M V as of 12/31/69</b>		<b>(J) Adjusted basis as of 12/31/69</b>	<b>(K) Excess of col. (I) over col. (J), if any</b>		
<b>a</b>					
<b>b</b>					
<b>c</b>					
<b>d</b>					
<b>e</b>					
<b>2 Capital gain net income or (net capital loss)</b>		<b>{ If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }</b>		<b>2</b>	<b>352,167.</b>
<b>3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8 . . . . .</b>				<b>3</b>	<b>0</b>

**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 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))
2011	488,151.	8,758,218.	0.055736
2010	402,321.	8,005,705.	0.050254
2009	320,491.	7,014,510.	0.045690
2008	429,157.	8,416,243.	0.050992
2007	371,344.	9,334,578.	0.039782
<b>2 Total of line 1, column (d)</b>			<b>2</b> 0.242454
<b>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</b>			<b>3</b> 0.048491
<b>4 Enter the net value of noncharitable-use assets for 2012 from Part X, line 5</b>			<b>4</b> 9,246,100.
<b>5 Multiply line 4 by line 3</b>			<b>5</b> 448,353.
<b>6 Enter 1% of net investment income (1% of Part I, line 27b)</b>			<b>6</b> 5,697.
<b>7 Add lines 5 and 6</b>			<b>7</b> 454,050.
<b>8 Enter qualifying distributions from Part XII, line 4</b>			<b>8</b> 511,074.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

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

1a	Exempt operating foundations described in section 4940(d)(2), check here ► <input type="checkbox"/> and enter "N/A" on line 1 . . .	{	1	5,697.
	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 ► <input checked="" type="checkbox"/> and enter 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	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	5,697.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-) . . .		4	0
5	<b>Tax based on investment income.</b> Subtract line 4 from line 3 If zero or less, enter -0- . . .		5	5,697.
6	<b>Credits/Payments:</b>			
a	2012 estimated tax payments and 2011 overpayment credited to 2012 . . .	6a	13,157.	
b	Exempt foreign organizations - tax withheld at source . . .	6b		
c	Tax paid with application for extension of time to file (Form 8868) . . .	6c		
d	Backup withholding erroneously withheld . . .	6d		
7	Total credits and payments Add lines 6a through 6d . . .	7	13,157.	
8	Enter any penalty for underpayment of estimated tax Check here <input type="checkbox"/> if Form 2220 is attached . . .	8		
9	Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed . . .	9		
10	<b>Overpayment.</b> If line 7 is more than the total of lines 5 and 8, enter the amount overpaid . . .	10	7,460.	
11	Enter the amount of line 10 to be Credited to 2013 estimated tax ► 7,460. Refunded ►	11		

**Part VII-A Statements 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
1b	Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see Instructions for the definition)? . . .	X	
	<i>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</i>		
1c	Did the foundation file Form 1120-POL for this year? . . .	X	
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation ► \$ _____ (2) On foundation managers ► \$ _____		
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► \$ _____		
2	Has the foundation engaged in any activities that have not previously been reported to the IRS? . . . <i>If "Yes," attach a detailed description of the activities</i>	X	
3	Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? <i>If "Yes," attach a conformed copy of the changes</i>	X	
4a	Did the foundation have unrelated business gross income of \$1,000 or more during the year? . . .	X	
b	If "Yes," has it filed a tax return on Form 990-T for this year? . . .	N/A	
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? . . . <i>If "Yes," attach the statement required by General Instruction T</i>	X	
6	Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument? . . .	X	
7	Did the foundation have at least \$5,000 in assets at any time during the year? <i>If "Yes," complete Part II, col (c), and Part XV</i>	X	
8a	Enter the states to which the foundation reports or with which it is registered (see instructions) ► AK, _____		
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? <i>If "No," attach explanation</i> . . .	X	
9	Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2012 or the taxable year beginning in 2012 (see instructions for Part XIV)? <i>If "Yes," complete Part XIV</i> . . .	X	
10	Did any persons become substantial contributors during the tax year? <i>If "Yes," attach a schedule listing their names and addresses</i> . . .	X	

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**Part VII-A Statements Regarding Activities (continued)**

11		X
12		X
13	X	
Website address ► <u>WWW.BBEDC.COM</u>		
14	STACI FIESER, FINANCE OFFICER	Telephone no. ► 907-842-4370
Located at ► <u>411 FIRST AVE EAST DILLINGHAM, AK</u> ZIP+4 ► <u>99576-1464</u>		
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. ► <u>15</u>	
16	Yes	No
See the instructions for exceptions and filing requirements for Form TD F 90-221. 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.

1a	During the year did the foundation (either directly or indirectly)	Yes	No
(1)	Engage in the sale or exchange, or leasing of property with a disqualified person? . . . . .	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? . . . . .	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? . . . . .	<input checked="" type="checkbox"/>	Yes <input type="checkbox"/> No
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? . . . . .	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? . . . . .	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) . . . . .	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see instructions)? . . . . .	1b	X
Organizations relying on a current notice regarding disaster assistance check here . . . . . ► <input type="checkbox"/>			
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 2012? . . . . .	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 2012, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2012? . . . . .	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
If "Yes," list the years ►			
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions) . . . . .	2b	N/A
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? . . . . .	<input type="checkbox"/>	Yes <input checked="" type="checkbox"/> No
b	If "Yes," did it have excess business holdings in 2012 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 2012) . . . . .	3b	N/A
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes? . . . . .	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2012? . . . . .	4b	X

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

5a	During the year did the foundation pay or incur any amount to	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(1)	Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(2)	Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
(3)	Provide a grant to an individual for travel, study, or other similar purposes? . . . . .	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> 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 instructions) . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> 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? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
b	If any answer is "Yes" to 5a(1)-(5), did <b>any</b> of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		5b	X
	Organizations relying on a current notice regarding disaster assistance check here . . . . . ► <input type="checkbox"/>				
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? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	If "Yes," attach the statement required by Regulations section 53.4945-5(d)				
6a	Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		6b	X
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No			
	If "Yes" to 6b, file Form 8870				
7a	At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? . . . . .	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		7b	N/A
b	If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? . . . . .				

**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 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
ATCH 17		9,500.	0	5,107.
-----				
-----				
-----				
-----				

**2 Compensation of five highest-paid employees (other than those included on line 1 - see 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
NONE				
-----				
-----				
-----				
-----				
-----				

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

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

(a) Name and address of each person paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		0
-----		
-----		
-----		
-----		
-----		
<b>Total number of others receiving over \$50,000 for professional services . . . . . ►</b>		0

**Part IX-A Summary of Direct Charitable Activities**

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 SCHOLARSHIP PROGRAM PROVIDING SCHOLARSHIPS TO RESIDENTS OF THE 17 BRISTOL BAY CDQ COMMUNITIES TO ATTEND ACCREDITED COLLEGES; IN 2012, 88 INDIVIDUALS RECEIVED SCHOLARSHIPS.	490,078.
2 ACADEMIC SUPPORT PROGRAM PROVIDING SUPPORT FOR FIRST AND SECOND YEAR STUDENTS AT UAF, UAA, AND FORT LEWIS COLLEGE.	20,996.
3 -----	
4 -----	

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

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2	Amount
1 NONE	
2 -----	
All other program-related investments. See instructions	
3 NONE	
-----	
<b>Total. Add lines 1 through 3 . . . . . ►</b>	

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

1 Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a Average monthly fair market value of securities . . . . .	1a	9,037,249.
b Average of monthly cash balances . . . . .	1b	349,655.
c Fair market value of all other assets (see instructions) . . . . .	1c	
d Total (add lines 1a, b, and c) . . . . .	1d	9,386,904.
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	
3 Subtract line 2 from line 1d . . . . .	3	9,386,904.
4 Cash deemed held for charitable activities Enter 1 1/2% of line 3 (for greater amount, see instructions) . . . . .	4	140,804.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4 . . . . .	5	9,246,100.
6 Minimum investment return. Enter 5% of line 5 . . . . .	6	462,305.

**Part XI Distributable Amount** (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ►  and do not complete this part)

1 Minimum investment return from Part X, line 6 . . . . .	1	462,305.
2a Tax on investment income for 2012 from Part VI, line 5 . . . . .	2a	5,697.
b Income tax for 2012. (This does not include the tax from Part VI) . . . . .	2b	
c Add lines 2a and 2b . . . . .	2c	5,697.
3 Distributable amount before adjustments Subtract line 2c from line 1 . . . . .	3	456,608.
4 Recoveries of amounts treated as qualifying distributions . . . . .	4	25,550.
5 Add lines 3 and 4 . . . . .	5	482,158.
6 Deduction from distributable amount (see instructions) . . . . .	6	
7 Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1 . . . . .	7	482,158.

**Part XII Qualifying Distributions** (see instructions)

1 Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a Expenses, contributions, gifts, etc - total from Part I, column (d), line 26 . . . . .	1a	511,074.
b Program-related investments - total from Part IX-B . . . . .	1b	
2 Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes . . . . .	2	
3 Amounts set aside for specific charitable projects that satisfy the:		
a Suitability test (prior IRS approval required) . . . . .	3a	
b Cash distribution test (attach the required schedule) . . . . .	3b	
4 Qualifying distributions. Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4 . . . . .	4	511,074.
5 Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions) . . . . .	5	5,697.
6 Adjusted qualifying distributions. Subtract line 5 from line 4 . . . . .	6	505,377.

**Note.** The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years.

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

	(a) Corpus	(b) Years prior to 2011	(c) 2011	(d) 2012
1 Distributable amount for 2012 from Part XI, line 7 . . . . .				482,158.
2 Undistributed income, if any, as of the end of 2012				
a Enter amount for 2011 only . . . . .				
b Total for prior years 20 10 20 09 20 08				
3 Excess distributions carryover, if any, to 2012				
a From 2007 . . . . .				
b From 2008 . . . . .	298.			
c From 2009 . . . . .				
d From 2010 . . . . .				
e From 2011 . . . . .	51,013.			
f Total of lines 3a through e . . . . .	51,311.			
4 Qualifying distributions for 2012 from Part XII, line 4 ► \$ . . . . .				511,074.
a Applied to 2011, but not more than line 2a . . . . .				
b Applied to undistributed income of prior years (Election required - see instructions) . . . . .				
c Treated as distributions out of corpus (Election required - see instructions) . . . . .				
d Applied to 2012 distributable amount . . . . .				482,158.
e Remaining amount distributed out of corpus . . . . .	28,916.			
5 Excess distributions carryover applied to 2012 . . . . . (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	80,227.			
b Prior years' undistributed income Subtract line 4b from line 2b . . . . .				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed . . . . .				
d Subtract line 6c from line 6b Taxable amount - see instructions . . . . .				
e Undistributed income for 2011 Subtract line 4a from line 2a Taxable amount - see instructions . . . . .				
f Undistributed income for 2012 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013 . . . . .				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions) . . . . .				
8 Excess distributions carryover from 2007 not applied on line 5 or line 7 (see instructions) . . . . .				
9 Excess distributions carryover to 2013. Subtract lines 7 and 8 from line 6a . . . . .	80,227.			
10 Analysis of line 9				
a Excess from 2008 . . . . .	298.			
b Excess from 2009 . . . . .				
c Excess from 2010 . . . . .				
d Excess from 2011 . . . . .	51,013.			
e Excess from 2012 . . . . .	28,916.			

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

---

**NOT APPLICABLE**

**1a** If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2012, enter the date of the ruling . . . . . ►

**b** Check box to indicate whether the foundation is a private operating foundation described in section

	Tax year	Prior 3 years			(e) Total
		(a) 2012	(b) 2011	(c) 2010	
2a	Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed . . . . .				
b	85% of line 2a . . . . .				
c	Qualifying distributions from Part XII, line 4 for each year listed .				
d	Amounts included in line 2c not used directly for active conduct of exempt activities . . . . .				
e	Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c . . . . .				
3	Complete 3a, b, or c for the alternative test relied upon				
a	"Assets" alternative test - enter:				
	(1) Value of all assets . . . . .				
	(2) Value of assets qualifying under section 4942(j)(3)(B)(i) . . . . .				
b	"Endowment" alternative test - enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed . . . . .				
c	"Support" alternative test - enter				
	(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties) . . . . .				
	(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii) . . . . .				
	(3) Largest amount of support from an exempt organization . . . . .				
	(4) Gross investment income . . . . .				

**Part XV Supplementary Information (Complete this part only if the foundation had \$5,000 or more in assets at any time during the year - see instructions.)**

## 1 Information Regarding Foundation Managers:

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than \$5,000.) (See section 507(d)(2).)

NONE

**b** List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest

NONE

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

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

a. The name, address, and telephone number or e-mail of the person to whom applications should be addressed

ATCH 18

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

HARVEY SAMUELSEN SCHOLARSHIP TRUST APPLICATION FORM AT ATTACHMENT 20

**c Any submission deadlines.**

SEE ATTACHED APPLICATION AT ATTACHMENT 20

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

SEE ATTACHED APPLICATION AT ATTACHMENT 20

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
<b>a Paid during the year</b> SEE ATTACHMENT 21			SEE ATTACHMENT 21	396,100.
<b>Total</b> . . . . .			► 3a	396,100.
<b>b Approved for future payment</b>				
<b>Total</b> . . . . .			► 3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions )
1	Program service revenue	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
a						
b						
c						
d						
e						
f						
g	Fees and contracts from government agencies					
2	Membership dues and assessments . . . . .					
3	Interest on savings and temporary cash investments					
4	Dividends and interest from securities . . . . .					
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					
9	Net income or (loss) from special events . . . . .					
10	Gross profit or (loss) from sales of inventory. . .					
11	Other revenue a					
b	ATCH 19					
c						
d						
e						
12	Subtotal Add columns (b), (d), and (e) . . . . .					645, 877.
13	Total. Add line 12, columns (b), (d), and (e) . . . . .					13 645, 877.

D-4 XVII-B Relationship of Activities to the Acquisition of Evidence

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

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

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 . . . . .	1a(1)	X
(2)	Other assets . . . . .	1a(2)	X
b	Other transactions:		
(1)	Sales of assets to a noncharitable exempt organization . . . . .	1b(1)	X
(2)	Purchases of assets from a noncharitable exempt organization . . . . .	1b(2)	X
(3)	Rental of facilities, equipment, or other assets . . . . .	1b(3)	X
(4)	Reimbursement arrangements . . . . .	1b(4)	X
(5)	Loans or loan guarantees . . . . .	1b(5)	X
(6)	Performance of services or membership or fundraising solicitations . . . . .	1b(6)	X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees . . . . .	1c	X
d	If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received.		

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

(a) Name of organization	(b) Type of organization	(c) Description of relationship
BRISTOL BAY ECONOMIC		ENTITIES ARE RELATED AND HAVE
DEVELOPMENT CORP.	501(C) (4)	COMMON CONTROL

**Sign  
Here**

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

Signature of officer or trustee

Date \_\_\_\_\_

► FINANCE OFFICER

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

<b>Paid Preparer Use Only</b>	Print/Type preparer's name <b>E. MARY THOMAS</b>	Preparer's signature <i>E. Mary Thomas</i>	Date 10-8-2013	Check <input type="checkbox"/> if self-employed	PTIN <b>P01288194</b>
	Firm's name ► KPMG LLP		Firm's EIN ► 13-5565207		
	Firm's address ► 701 WEST 8TH AVENUE, SUITE 600 ANCHORAGE, AK		99501	Phone no 907-265-1200	

► Attach to Form 990, Form 990-EZ, or Form 990-PF.

**2012**

Name of the organization

HARVEY SAMUELSEN SCHOLARSHIP TRUST

Employer identification number

30-0065137

Organization type (check one):

Filers of:

Form 990 or 990-EZ

Section:

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

Form 990-PF

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

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

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

**General Rule**

- For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, \$5,000 or more (in money or property) from any one contributor. Complete Parts I and II

**Special Rules**

- For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3 % support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi) and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h, or (ii) Form 990-EZ, line 1 Complete Parts I and II
- For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, total contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals Complete Parts I, II, and III
- For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not total to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year . . . . . ► \$ . . . . .

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

Name of organization HARVEY SAMUELSEN SCHOLARSHIP TRUST

Employer identification number

30-0065137

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

(a) No.	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	BRISTOL BAY ECON. DEV. CORP. P.O. BOX 1464 DILLINGHAM, AK 99576	\$ 111,312.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
2	ARCTIC FJORD, INC. 400 N. 34TH STREET., STE 306 SEATTLE, WA 98103	\$ 219,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
3	ARCTIC STORM, INC. 400 N. 34TH STREET., STE 306 SEATTLE, WA 98103	\$ 80,500.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution)

Name of organization HARVEY SAMUELSEN SCHOLARSHIP TRUST

Employer identification number

30-0065137

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

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$-----	-----
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$-----	-----

Name of organization HARVEY SAMUELSEN SCHOLARSHIP TRUST

Employer identification number

30-0065137

**Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations that total more than \$1,000 for the year.** Complete columns (a) through (e) and the following line entry.

For organizations completing Part III, enter the total of *exclusively religious, charitable, etc., contributions of \$1,000 or less* for the year (Enter this information once. See instructions.) ► \$ \_\_\_\_\_  
Use duplicate copies of Part III if additional space is needed.

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
-----	-----	-----	-----
-----	-----	-----	-----
-----	-----	-----	-----
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
-----		-----	
-----		-----	
-----		-----	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
-----		-----	
-----		-----	
-----		-----	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
-----		-----	
-----		-----	
-----		-----	
(e) Transfer of gift			
Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee	
-----		-----	
-----		-----	
-----		-----	

**SCHEDULE D  
(Form 1041)**Department of the Treasury  
Internal Revenue Service**Capital Gains and Losses**

► Attach to Form 1041, Form 5227, or Form 990-T.  
► Information about Schedule D (Form 1041) and its separate instructions is at  
[www.irs.gov/form1041](http://www.irs.gov/form1041).

OMB No 1545-0092

**2012**

Name of estate or trust

HARVEY SAMUELSEN SCHOLARSHIP TRUST

Employer identification number

30-0065137

Note: Form 5227 filers need to complete **only** Parts I and II**Part I Short-Term Capital Gains and Losses - Assets Held One Year or Less**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co )	(b) Date acquired (mo , day, yr )	(c) Date sold (mo , day, yr )	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
1a					
b Enter the short-term gain or (loss), if any, from Schedule D-1, line 1b . . . . .	1b	53,073.			
2 Short-term capital gain or (loss) from Forms 4684, 6252, 6781, and 8824 . . . . .	2				
3 Net short-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .	3				
4 Short-term capital loss carryover. Enter the amount, if any, from line 9 of the 2011 Capital Loss Carryover Worksheet . . . . .	4	( )			
5 Net short-term gain or (loss). Combine lines 1a through 4 in column (f) Enter here and on line 13, column (3) on the back . . . . . ►	5	53,073.			

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

(a) Description of property (Example 100 shares 7% preferred of "Z" Co )	(b) Date acquired (mo , day, yr )	(c) Date sold (mo , day, yr )	(d) Sales price	(e) Cost or other basis (see instructions)	(f) Gain or (loss) for the entire year Subtract (e) from (d)
6a					
b Enter the long-term gain or (loss), if any, from Schedule D-1, line 6b . . . . .	6b	299,094.			
7 Long-term capital gain or (loss) from Forms 2439, 4684, 6252, 6781, and 8824 . . . . .	7				
8 Net long-term gain or (loss) from partnerships, S corporations, and other estates or trusts . . . . .	8				
9 Capital gain distributions . . . . .	9				
10 Gain from Form 4797, Part I . . . . .	10				
11 Long-term capital loss carryover. Enter the amount, if any, from line 14 of the 2011 Capital Loss Carryover Worksheet . . . . .	11	( )			
12 Net long-term gain or (loss). Combine lines 6a through 11 in column (f) Enter here and on line 14a, column (3) on the back . . . . . ►	12	299,094.			

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

Schedule D (Form 1041) 2012

<b>Part III Summary of Parts I and II</b>		<b>(1) Beneficiaries' (see instr.)</b>	<b>(2) Estate's or trust's</b>	<b>(3) Total</b>
13	Net short-term gain or (loss) . . . . .	13		53,073.
14	Net long-term gain or (loss):			
a	Total for year . . . . .	14a		299,094.
b	Unrecaptured section 1250 gain (see line 18 of the wrksht) . . . . .	14b		
c	28% rate gain . . . . .	14c		
15	Total net gain or (loss). Combine lines 13 and 14a ►	15		352,167.

**Note:** If line 15, column (3), is a net gain, enter the gain on Form 1041, line 4 (or Form 990-T, Part I, line 4a). If lines 14a and 15, column (2), are net gains, go to Part V, and do not complete Part IV. If line 15, column (3), is a net loss, complete Part IV and the Capital Loss Carryover Worksheet, as necessary.

#### **Part IV Capital Loss Limitation**

16	Enter here and enter as a (loss) on Form 1041, line 4 (or Form 990-T, Part I, line 4c, if a trust), the smaller of:		
	a The loss on line 15, column (3) or b \$3,000	16	( )

**Note:** If the loss on line 15, column (3), is more than \$3,000, or if Form 1041, page 1, line 22 (or Form 990-T, line 34), is a loss, complete the Capital Loss Carryover Worksheet in the instructions to figure your capital loss carryover.

#### **Part V Tax Computation Using Maximum Capital Gains Rates**

**Form 1041 filers.** Complete this part only if both lines 14a and 15 in column (2) are gains, or an amount is entered in Part I or Part II and there is an entry on Form 1041, line 2b(2), and Form 1041, line 22, is more than zero.

**Caution:** Skip this part and complete the Schedule D Tax Worksheet in the instructions if:

- Either line 14b, col. (2) or line 14c, col. (2) is more than zero, or
- Both Form 1041, line 2b(1), and Form 4952, line 4g are more than zero.

**Form 990-T trusts.** Complete this part only if both lines 14a and 15 are gains, or qualified dividends are included in income in Part I of Form 990-T, and Form 990-T, line 34, is more than zero. Skip this part and complete the Schedule D Tax Worksheet in the instructions if either line 14b, col. (2) or line 14c, col. (2) is more than zero.

17	Enter taxable income from Form 1041, line 22 (or Form 990-T, line 34) . . .	17	
18	Enter the smaller of line 14a or 15 in column (2) but not less than zero. . . . .	18	
19	Enter the estate's or trust's qualified dividends from Form 1041, line 2b(2) (or enter the qualified dividends included in income in Part I of Form 990-T) . . .	19	
20	Add lines 18 and 19 . . . . .	20	
21	If the estate or trust is filing Form 4952, enter the amount from line 4g; otherwise, enter -0- . . . ►	21	
22	Subtract line 21 from line 20. If zero or less, enter -0- . . . . .	22	
23	Subtract line 22 from line 17. If zero or less, enter -0- . . . . .	23	
24	Enter the smaller of the amount on line 17 or \$2,400 . . . . .	24	
25	Is the amount on line 23 equal to or more than the amount on line 24?		
	<input type="checkbox"/> Yes. Skip lines 25 and 26; go to line 27 and check the "No" box	25	
	<input type="checkbox"/> No. Enter the amount from line 23. . . . .	26	
26	Subtract line 25 from line 24. . . . .	26	
27	Are the amounts on lines 22 and 26 the same?	27	
	<input type="checkbox"/> Yes. Skip lines 27 thru 30, go to line 31	28	
	<input type="checkbox"/> No. Enter the smaller of line 17 or line 22	29	
28	Enter the amount from line 26 (If line 26 is blank, enter -0-) . . . . .	28	
29	Subtract line 28 from line 27 . . . . .	29	
30	Multiply line 29 by 15% (.15) . . . . .	30	
31	Figure the tax on the amount on line 23. Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) . . . . .	31	
32	Add lines 30 and 31 . . . . .	32	
33	Figure the tax on the amount on line 17. Use the 2012 Tax Rate Schedule for Estates and Trusts (see the Schedule G instructions in the instructions for Form 1041) . . . . .	33	
34	<b>Tax on all taxable income.</b> Enter the smaller of line 32 or line 33 here and on Form 1041, Schedule G, line 1a (or Form 990-T, line 36) . . . . .	34	

Schedule D (Form 1041) 2012

► Attach to Schedule D to list additional transactions for lines 1a and 6a.

► **Information about Schedule D (Form 1041) and its separate instructions is at [www.irs.gov/form1041](http://www.irs.gov/form1041).**

---

**Name of estate or trust**

**Employer identification number**  
30-0065137

HARVEY SAMUELSEN SCHOLARSHIP TRUST

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

**1b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 1b . . . . .**

53,073.

---

For Paperwork Reduction Act Notice, see the Instructions for Form 1041.

**Schedule D-1 (Form 1041) 2012**

151  
ISA

USA  
2F1221 2 000

TR4973 1832

V 12-6.8F

790642

Name of estate or trust as shown on Form 1041 Do not enter name and employer identification number if shown on the other side

**Employer identification number**

**Part II Long-Term Capital Gains and Losses - Assets Held More Than One Year**

6b Total. Combine the amounts in column (f) Enter here and on Schedule D, line 6b . . . . . 299,094.

---

**Schedule D-1 (Form 1041) 2012**

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**FORM 990-PF - PART IV**  
**CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME**

Kind of Property		Description				P or D	Date acquired	Date sold
Gross sale price less expenses of sale	Depreciation allowed/ allowable	Cost or other basis	FMV as of 12/31/69	Adj basis as of 12/31/69	Excess of FMV over adj basis		Gain or (loss)	
167,174.		UBS07010 PROPERTY TYPE: SECURITIES 151,539.				P	VARIOUS 15,635.	VARIOUS
590,368.		UBS07010 PROPERTY TYPE: SECURITIES 546,214.				P	VARIOUS 44,154.	VARIOUS
1,392,041.		UBS07011 PROPERTY TYPE: SECURITIES 1,361,830.				P	VARIOUS 30,211.	VARIOUS
870,762.		UBS07011 PROPERTY TYPE: SECURITIES 647,261.				P	VARIOUS 223,501.	VARIOUS
81,133.		UBS70614 PROPERTY TYPE: SECURITIES 80,057.				P	VARIOUS 1,076.	VARIOUS
4,097.		UBS32270 PROPERTY TYPE: SECURITIES 4,390.				P	VARIOUS -293.	VARIOUS
78,439.		UBS32270 PROPERTY TYPE: SECURITIES 78,390.				P	VARIOUS 49.	VARIOUS
2,177,523.		BOFA1255868 PROPERTY TYPE: SECURITIES 2,166,406.				P	VARIOUS 11,117.	VARIOUS
558,764.		BOFA1255868 PROPERTY TYPE: SECURITIES 528,452.				P	VARIOUS 30,312.	VARIOUS
2.		UBS32270 PROPERTY TYPE: SECURITIES				P	VARIOUS 2.	VARIOUS
29,801.		UBS70614 PROPERTY TYPE: SECURITIES 33,398.				P	VARIOUS -3,597.	VARIOUS
TOTAL GAIN(LOSS) .....							<u>352,167.</u>	

## HARVEY SAMUELSEN SCHOLARSHIP TRUST

## FORM 990PF, PART IV - CAPITAL GAINS AND LOSSES FOR TAX ON INVESTMENT INCOME

30-0065137

List and Describe the Kind of Property Sold	How Acquired	Date Acquired	Date Sold	Gross Sales Price	Depreciation Allowed or Allowable	Cost or Other Basis	Gain or (Loss)	
							Short or	Long Term
UBS ACCOUNT 07010 - MARKETABLE SECURITIES	PURCHASE	VARIOUS	VARIOUS	167,174		15,539	15,635	SHORT
UBS ACCOUNT 07010 - MARKETABLE SECURITIES	PURCHASE	VARIOUS	VARIOUS	590,368		546,214	44,154	LONG
UBS ACCOUNT 07011 - MARKETABLE SECURITIES	PURCHASE	VARIOUS	VARIOUS	1,392,041		1,361,830	30,211	SHORT
UBS ACCOUNT 07011 - MARKETABLE SECURITIES	PURCHASE	VARIOUS	VARIOUS	870,762		647,261	223,501	LONG
UBS ACCOUNT 70614 - MARKETABLE SECURITIES	PURCHASE	VARIOUS	VARIOUS	29,801		33,398	(3,597)	SHORT
UBS ACCOUNT 70614 - MARKETABLE SECURITIES	PURCHASE	VARIOUS	VARIOUS	81,133		80,057	1,076	LONG
UBS ACCOUNT 32270 - MARKETABLE SECURITIES	PURCHASE	VARIOUS	VARIOUS	4,097		4,390	(293)	SHORT
UBS ACCOUNT 32270 - MARKETABLE SECURITIES	PURCHASE	VARIOUS	VARIOUS	78,439		78,390	49	LONG
UBS ACCOUNT 32270 - ADDITIONAL PROCEEDS	PURCHASE	VARIOUS	VARIOUS	2		0	2	LONG
BOA ACCOUNT 12558868 - MARKETABLE SECURITIES	PURCHASE	VARIOUS	VARIOUS	2,177,523		2,166,406	11,117	SHORT
BOA ACCOUNT 12558868 - MARKETABLE SECURITIES	PURCHASE	VARIOUS	VARIOUS	558,764		528,452	30,312	LONG
<b>TOTALS</b>		<b>5,950,104</b>	<b>NONE</b>	<b>5,597,937</b>	<b>352,167</b>			

FORM 990PF, PART I - CONTRIBUTIONS, GIFTS AND GRANTS RECEIVEDATTACHMENT 1

<u>NAME AND ADDRESS</u>	<u>DATE</u>	<u>DIRECT PUBLIC SUPPORT</u>
-------------------------	-------------	--------------------------------------

BRISTOL BAY ECON. DEV. CORP.  
P.O. BOX 1464  
DILLINGHAM, AK 99576

1111,312.

ARCTIC FJORD, INC.  
400 N. 34TH STREET., STE 306  
SEATTLE, WA 98103

12/27/2012

ARCTIC STORM, INC.  
400 N. 34TH STREET., STE 306  
SEATTLE, WA 98103

12/27/2012

TOTAL CONTRIBUTION AMOUNTS

411,312.

FORM 990PF, PART I - DIVIDENDS AND INTEREST FROM SECURITIES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
DIVIDENDS FROM SECURITIES	219,671.	219,671.
INTEREST FROM SECURITIES	71,674.	71,674.
TOTAL	<u>291,345.</u>	<u>291,345.</u>

FORM 990PF, PART I - OTHER INCOMEATTACHMENT 3

<u>DESCRIPTION</u>	<u>BOOK SALE REVENUE</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>
MISCELLANEOUS INCOME		<u>2,326.</u>	<u>39.</u>	<u>2,326.</u>
TOTALS		<u><u>2,365.</u></u>	<u><u>39.</u></u>	<u><u>2,326.</u></u>

FORM 990PF, PART I - LEGAL FEESATTACHMENT 4

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
LEGAL FEES	70.			70.
TOTALS		70.		70.

FORM 990PF, PART I - ACCOUNTING FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>ADJUSTED NET INCOME</u>	<u>CHARITABLE PURPOSES</u>
TAX RETURN PREPARATION FEES	7,400.		7,400.	
TOTALS	<u><u>7,400.</u></u>		<u><u>7,400.</u></u>	

ATTACHMENT 6FORM 990PF, PART I - OTHER PROFESSIONAL FEES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>
INVESTMENT MANAGEMENT FEES	58,382.	58,382.
TOTALS	<u>58,382.</u>	<u>58,382.</u>

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ATTACHMENT 7

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FORM 990PF, PART I - TAXES

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>
EXCISE TAXES	5,695.
TOTALS	<u>5,695.</u>

FORM 990PF, PART I - OTHER EXPENSESATTACHMENT 8

<u>DESCRIPTION</u>	<u>REVENUE AND EXPENSES PER BOOKS</u>	<u>NET INVESTMENT INCOME</u>	<u>CHARITABLE PURPOSES</u>
OUTREACH/SCHOOL VISITS	8,965.		8,965.
BBEDC ADMINISTRATION CHARGE	51,363.	6,486.	44,877.
ACADEMIC SUPPORT	10,067.		9,962.
SUPPLIES	342.		342.
INSURANCE	1,322.		1,322.
ADVERTISEMENT	1,050.		1,050.
TOTALS	<u>73,109.</u>	<u>6,486.</u>	<u>66,518.</u>

FORM 990PF, PART II - PREPAID EXPENSES AND DEFERRED CHARGES

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
PREPAID FEDERAL TAXES	13,156.	7,461.	7,461.
PREPAID SCHOLARSHIP	2,190.	NONE.	NONE.
<b>TOTALS</b>	<b><u>15,346.</u></b>	<b><u>7,461.</u></b>	<b><u>7,461.</u></b>

FORM 990PF, PART II - U.S. AND STATE OBLIGATIONS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
GOVERNMENT SECURITIES	1,007,564.	1,112,862.	1,112,862.
US OBLIGATIONS TOTAL	<u>1,007,564.</u>	<u>1,112,862.</u>	<u>1,112,862.</u>

ATTACHMENT 10

FORM 990PF, PART II - CORPORATE STOCK

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
EQUITY SECURITIES/MUTUAL FUNDS	<u>6,148,585.</u>	<u>7,092,891.</u>	<u>7,092,891.</u>
TOTALS	<u><u>6,148,585.</u></u>	<u><u>7,092,891.</u></u>	<u><u>7,092,891.</u></u>

ATTACHMENT 11

FORM 990PF, PART II - CORPORATE BONDS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
VARIOUS CORPORATE BONDS	<u>1,019,338.</u>	<u>1,042,871.</u>	<u>1,042,871.</u>
TOTALS	<u><u>1,019,338.</u></u>	<u><u>1,042,871.</u></u>	<u><u>1,042,871.</u></u>

FORM 990PF, PART II - OTHER INVESTMENTS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
FOREIGN BONDS	110,162.	75,840.	75,840.
OTHER FIXED INCOME	35,863.	31,298.	31,298.
TOTALS	<u><u>146,025.</u></u>	<u><u>107,138.</u></u>	<u><u>107,138.</u></u>

ATTACHMENT 13

FORM 990PE, PART II - OTHER ASSETS

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>	<u>ENDING FMV</u>
ACCRUED INTEREST	18,574.	15,330.	15,330.
TOTALS	<u>18,574.</u>	<u>15,330.</u>	<u>15,330.</u>

ATTACHMENT 14

ATTACHMENT 15FORM 990PF, PART II - OTHER LIABILITIES

<u>DESCRIPTION</u>	<u>BEGINNING BOOK VALUE</u>	<u>ENDING BOOK VALUE</u>
PAYABLE TO AFFILIATE (BBEDC)	114,065.	92,173.
TOTALS	<u>114,065.</u>	<u>92,173.</u>

ATTACHMENT 16FORM 990PF, PART III - OTHER INCREASES IN NET WORTH OR FUND BALANCES

<u>DESCRIPTION</u>	<u>AMOUNT</u>
UNREALIZED GAIN ON MARKETABLE SECURITIES	580,190.
TOTAL	<u>580,190.</u>

## FORM 990PF, PART VIII - LIST OF OFFICERS, DIRECTORS, AND TRUSTEES

## ATTACHMENT 17

## NAME AND ADDRESS

MARY ANN K. JOHNSON  
P.O. BOX 1464  
DILLINGHAM, AK 99576-1464PRESIDENT  
.10TITLE AND AVERAGE HOURS PER  
WEEK DEVOTED TO POSITION

## COMPENSATION

CONTRIBUTIONS  
TO EMPLOYEE  
BENEFIT PLANSEXPENSE ACCT  
AND OTHER  
ALLOWANCESGERDA KOSBRUK  
P.O. BOX 1464  
DILLINGHAM, AK 99576-1464TREASURER  
.10FRITZ SHARP  
P.O. BOX 1464  
DILLINGHAM, AK 99576-1464VICE PRESIDENT  
.10CINDY GABEL  
P.O. BOX 1464  
DILLINGHAM, AK 99576-1464BOARD MEMBER  
.10EVERETT THOMPSON  
P.O. BOX 1464  
DILLINGHAM, AK 99576-1464SECRETARY  
.10

GRAND TOTALS

9,500.

0

5,107.

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ATTACHMENT 18

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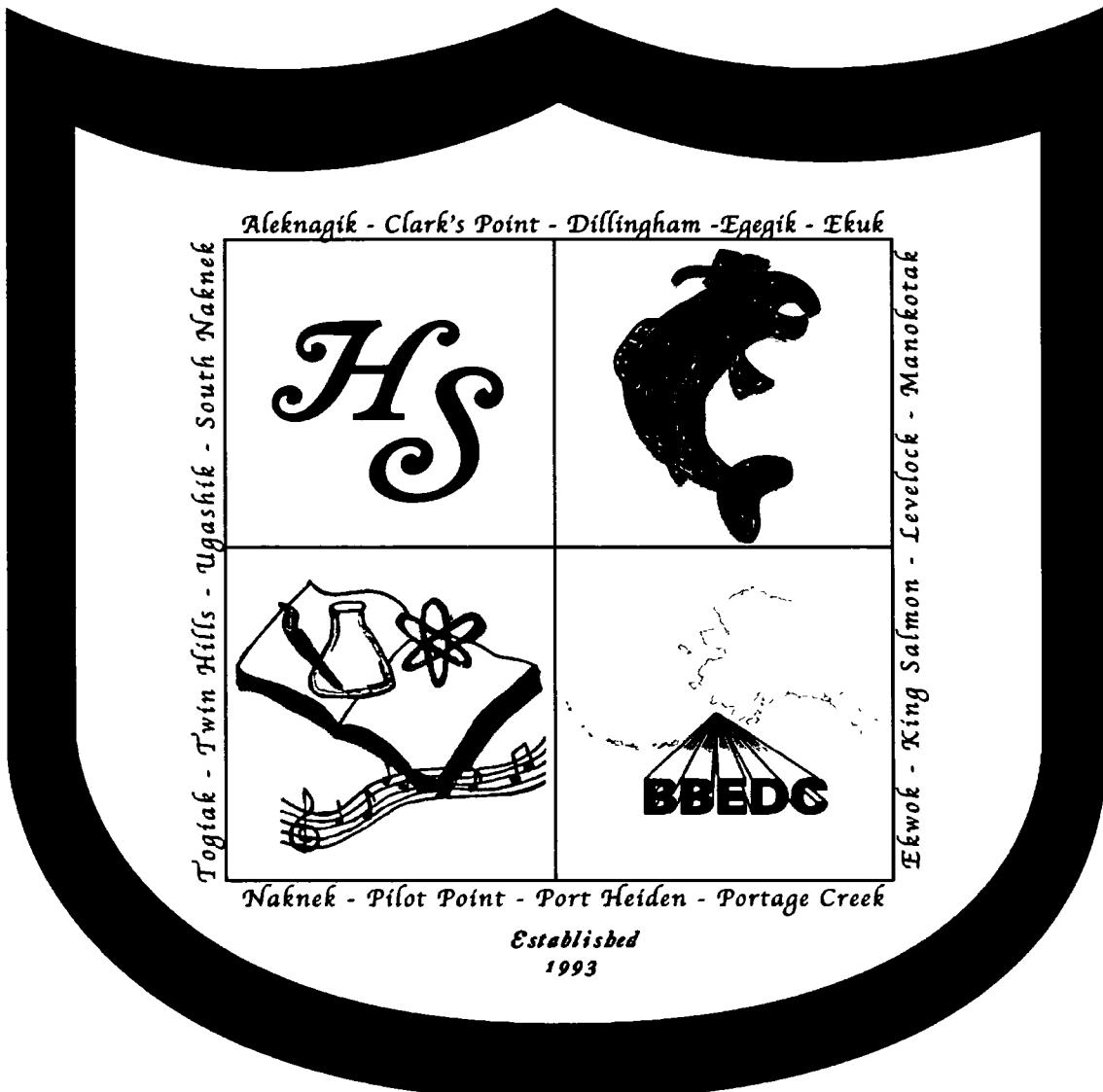
FORM 990PF, PART XV - NAME, ADDRESS AND PHONE FOR APPLICATIONS

BBEDC  
P.O. BOX 1464  
DILLINGHAM, AK 99576-1464  
907-842-4370

FORM 990-PF, PART XVI-A - ANALYSIS OF OTHER REVENUE

<u>DESCRIPTION</u>	<u>BUSINESS CODE</u>	<u>AMOUNT</u>	<u>EXCLUSION CODE</u>	<u>AMOUNT</u>	<u>RELATED OR EXEMPT FUNCTION INCOME</u>
MISCELLANEOUS INCOME					
BOOK SALE REVENUE			01	39.	
		05		2,326.	
TOTALS				<u>2,365.</u>	

ATTACHMENT 19



## 2012-2013 Scholarship Application

# **Harvey Samuelsen Scholarship**

## **Eligibility Requirements**

In order to be considered for the Harvey Samuelsen Scholarship, you must meet the following requirements:

- ※ Be a resident of a Bristol Bay CDQ community: Aleknagik; Clarks Point; Dillingham; Egegik; Ekuk; Ekwok; King Salmon; Levelock; Manokotak; Naknek; Pilot Point; Port Heiden; Portage Creek; South Naknek; Togiak; Twin Hills; Ugashik.
- ※ Be enrolled in an accredited college or university
- ※ Be able to demonstrate financial need
- ※ Be registered as a “Full-time” student, pursuing an Associates degree or higher
- ※ Undergraduate students must have a minimum 2.0 cumulative GPA
- ※ Graduate students must have a minimum 3.0 cumulative GPA

## **Application Deadline is June 29, 2012**

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If you have any questions regarding eligibility, call BBEDC at 1-800-478-4370 or  
1-907-842-4370

# Harvey Samuelsen Scholarship

## Application Checklist

In order for your application to be complete, you must submit the following documents:

- ✓ Completed Application
- ✓ BBEDC Residency Form with **required attachments** (photo ID + one additional doc.)
- ✓ High School or **College Transcript** (must show spring 2011 grades.)
- ✓ Letter of Interest
- ✓ Copy of School's Letter of Acceptance (Incoming Freshman and transfer students only)
- ✓ Release of Information Form
- ✓ Copy of Cost of Attendance sheet from University
- ✓ BBEDC Relationship Disclosure Form

**BBEDC Residency Form must be completed every 12 months**

**Transcripts are required**

**Applications must be mailed or hand delivered to BBEDC's Dillingham Office. Mailed applications must be post-marked by June 29, 2012.**

### Application Suggestions:

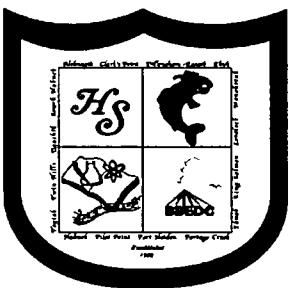
- ❖ Submit application as soon as Spring term 2012 grades have been posted.
- ❖ Remember **only complete** applications will be considered (It is **your responsibility** to make sure your application is complete.)
- ❖ Type your letter of interest and, when possible, the application as well.
- ❖ Double-check your financial budget sheet, this information must be accurate! (Make sure your math is correct.)
- ❖ Submit your application and all required documents in the provided pre-addressed envelope.

Mail your applications to:

Bristol Bay Economic Development Corporation  
P.O. Box 1464  
Dillingham AK 99576

If you have any questions or need assistance with your application, call BBEDC at:

**1-800-478-4370 or 1-907-842-4370**



**Harvey Samuelsen Scholarship Trust**  
P.O. Box 1464, Dillingham, AK 99576  
(907) 842-4370 \* 1-800-478-4370  
Fax: (907) 842-4336 \* 1-888-325-4336

**PERSONAL INFORMATION:**

First Name: \_\_\_\_\_ Last Name: \_\_\_\_\_

SSN: \_\_\_\_\_ Student ID # \_\_\_\_\_

Date of Birth: \_\_\_\_\_

Home Address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_

Dorm room or apartment address: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Dorm room/apartment phone # or cell phone#: \_\_\_\_\_

Community and State of Residency: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**Application Deadline is June 29, 2012**

## SCHOOL INFORMATION

High School attended: \_\_\_\_\_

Graduation Date: \_\_\_\_\_

GED  Date: \_\_\_\_\_

School currently attending: \_\_\_\_\_

School planning to attend: \_\_\_\_\_

Address of Financial Aid office: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip: \_\_\_\_\_

Financial Aid Office Phone: \_\_\_\_\_

Have you applied for admission? Yes  No       Been accepted? Yes  No

University Class Standing: 1<sup>st</sup> year  2<sup>nd</sup> year  3<sup>rd</sup> year  4<sup>th</sup> year +  Graduate School

College credits earned to date: \_\_\_\_\_

College Major: \_\_\_\_\_ Expected Graduation Date: \_\_\_\_\_

Expected Degree:      Associate       Bachelor       Master       Doctorate

Number of credit hours in which you plan to enroll: Fall \_\_\_\_\_ Winter \_\_\_\_\_ Spring \_\_\_\_\_ Summer \_\_\_\_\_

School on:      Quarters       Semesters       Trimesters

Cumulative GPA: \_\_\_\_\_

**Application Deadline is June 29, 2012**

## FINANCIAL INFORMATION

### FINANCIAL AID

Please list all sources of financial aid (loans, scholarships, grants, etc.) you are applying for:

Name of Scholarship, Grant, etc.	Expected Date of Notification	Amount Requested	Amount Received, Approved
<b>Total of Financial Aid Requested</b>			
<b>Total of Financial Aid Approved</b>			

(Attach additional page if needed)

Table 1

### SCHOOL YEAR EXPENSES

*(Note: These figures must be as accurate as possible as we will verify them with the school you will be attending. Any intentional misrepresentation of your financial information will disqualify you from receiving any scholarship from the Bristol Bay Economic Development Corporation. If you are unsure of what your expenses will be, contact the university or college you will be attending.)*

Tuition	
Fees/Due	
Room/Rent	
Meals/Food Expense	
Books & Supplies	
Travel (Limited to 2 R.T. tickets)	
Child Care	
Miscellaneous:	Clothing (maximum allowed is \$300)
	Entertainment (maximum allowed is \$250)
<b>Total School Year Expenses</b>	

Table 2

### FINANCIAL NEED

Total School Year Expenses (Table 2)	
Total Amount of Funds Approved (Table 1)	
<b>Total Estimated Financial Need</b>	

## LETTER OF INTEREST

Your letter of interest should be no longer than one typed page and should address the following questions:

1. What are your educational and career goals?
2. What are you contributing to your education?
3. Why should you be selected to receive a scholarship?

**If you fail to address the above questions in your letter of interest, your application may be deemed incomplete and therefore you will not receive an award. Do not submit the same letter that was submitted with prior year applications.**

**By signing this page and also your attached letter, you affirm that this is your own original work and understand that if it is not, your application may be rejected and any award granted may be canceled.**

I, \_\_\_\_\_ certify that the information herein, financial or otherwise, is correct and any intentional misrepresentation therein will negate my participation now and hereafter in the Scholarship Program administered by Bristol Bay Economic Development Corporation.

Applicant's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Application Deadline is June 29, 2012**

## **AUTHORIZATION FOR RELEASE OF INFORMATION**

I hereby authorize the release of any and all information contained in city councils, village councils, state, federal, private or educational agencies' records to the organization below:

**BRISTOL BAY ECONOMIC DEVELOPMENT CORPORATION**  
**P. O. Box 1464**  
**Dillingham, Alaska 99576**  
**Fax Number 1-888-325-4336 (In state) 907-842-4336 (Out of state)**

This information is to be used for the verification of the eligibility of:

---

This authority shall continue in effect until this student is no longer enrolled in the Harvey Samuelsen Scholarship Program.

Signature: \_\_\_\_\_ Date \_\_\_\_\_

Social Security Number: \_\_\_\_\_ Date of Birth \_\_\_\_\_

I hereby authorize BBEDC to publicize my name, institution, degree and major, year in college, and village of residency to further encourage youth of the Bristol Bay Region to obtain higher education. In addition, I authorize the same organizations to provide my name for employment purposes. This authority shall continue in effect until I am no longer in the Harvey Samuelsen Scholarship Program.

Signature \_\_\_\_\_ Date \_\_\_\_\_

**Application Deadline is June 29, 2012**

## **BBEDC Affidavit of Residency Form**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_ City/State: \_\_\_\_\_ Zip: \_\_\_\_\_

Phone: \_\_\_\_\_ Fax: \_\_\_\_\_ How long at this address? \_\_\_\_\_

The Bristol Bay Economic Development Corporation requires that anyone seeking services from BBEDC is a resident of one of the 17 Bristol Bay CDQ communities. (*Aleknagik; Clarks Point; Dillingham; Egegik; Ekuk; Ekwok; King Salmon, Levelock; Manokotak; Naknek; Pilot Point; Port Heiden; Portage Creek, South Naknek; Togiak; Twin Hills; Ugashik*) Definition of a CDQ community resident: A person who has resided (lived) in the CDQ community for a period of 12 consecutive months or more immediately **prior to application** and continues to live in that CDQ community. Unexcused absences for up to 90 consecutive days per year are allowable.

Incarceration does not disqualify an individual from program eligibility, however, incarceration for more than 90 days is an inexcusable absence. The residency of any person under the age of 18 years shall be the same as the residency of the adult(s) who claim that person as a dependent on their federal tax return. **Residency must be renewed annually.**

In order to verify your residency in one of the 17 CDQ communities you **must** provide the following documentation showing **your name & current address**:

- A copy of your government issued photo ID (Example: AK Drivers License/ID card, Military or Tribal ID card) **AND** a copy of at least **one** of the following documents:
  - Permanent Fund Dividend check stub
  - Current electric, telephone, fuel bill or receipt
  - Most recent pay check stub or W-2
  - Recent TANF or Food Stamp benefit award letter
  - Current ADF&G commercial/sport fishing or hunting license

If you are out of the CDQ community for more than 90 consecutive days, the **only excusable absences** are: **post-secondary purposes; military service; participation in BBEDC Employment & Training Programs or medical reasons**. To waive the 90-day requirement you must supply **one** of the following:

- A copy of your school enrollment form or transcripts verifying full-time attendance during the previous year if you are a student away from home attending school
- A copy of your current orders if you are on active military duty
- A letter of verification of program participation from BBEDC Employment & Training staff
- A letter from your physician stating the reason for the need to reside in another location and the time estimated for the stay

By signing this affidavit, I warrant that I am a resident of the community from which I am applying and I attest that the documents submitted are true and accurate to the best of my knowledge. I acknowledge that any falsification or misrepresentation of the information submitted will result in the termination of benefits and I may be required to pay back any funds that were provided by BBEDC as a result of the information provided.

**SIGNATURE:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

**This form must be signed by an Authorized Representative of the Village/Tribal Council or the City Government.**

I verify that \_\_\_\_\_ is a resident of \_\_\_\_\_, and \_\_\_\_\_.

has been       has not been      (Reason: \_\_\_\_\_) residing in this CDO community for the **past twelve months**.

**PRINT NAME:** \_\_\_\_\_ **SIGNATURE:** \_\_\_\_\_

**ORGANIZATION:** \_\_\_\_\_ **DATE:** \_\_\_\_\_

## BBEDC Relationship Disclosure Form

### Applicant Name

### Community

Please put a check mark next to the BBEDC Board Member(s) listed below that you are related to. If you are not related to any, please check None.

	Hattie Albecker <b>Ugashik</b>		Margie Aloysius <b>Aleknagik</b>		Fred T. Angasan Sr. <b>South Naknek</b>		Mark Angasan <b>King Salmon</b>
	Raymond Apokedak <b>Levelock</b>		Cindy Gabel <b>Egegik</b>		Robert Heyano <b>Ekuk</b>		MaryAnn Johnson <b>Portage Creek</b>
	Kenneth Jensen <b>Ekwok</b>		Gerda Kosbruk <b>Port Heiden</b>		Moses Kritz <b>Togiak</b>		H. Robin Samuelsen Jr. <b>Dillingham</b>
	Victor Seybert <b>Pilot Point</b>		Fritz Sharp <b>Twin Hills</b>		Moses Toyukak Sr. <b>Manokotak</b>		Betty Gardiner <b>Clark's Point</b>
	Everett Thompson <b>Naknek</b>		<b>None</b>				

For each Board Member you checked above, please explain the relationship.

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Please put a check mark next to the BBEDC Officer(s) listed below that you are related to. If you are not related to any, please check None.

	H. Robin Samuelsen Jr.		Helen Smeaton		Chris Napoli		Staci Fieser
	Paul Peyton		<b>None</b>				

For each Officer you checked above, please explain the relationship.

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Applicant Signature

Date

Last Name	First Name	Home Address	City, State, Zip	Relationship	Foundation Status of Recipient	Purpose of Grant or Contribution	Award
Akekkok	Luki	PO Box 1245	Dillingham, AK 99576	Cousin of BBEDC Board Member	None	Educational Scholarship	\$ 4,560.00
Anderson	Nathan	PO Box 1082	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 6,750.00
Aspelund	Zackary	PO Box 221	Naknek, AK 99633	None	None	Educational Scholarship	\$ 4,560.00
Ayolak-Greenly	Amy	PO Box 295	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Baum	Virginia	PO Box 325	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 2,190.00
Bennett	Tiffany	PO Box 468	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Bobbit	Virginia	PO Box 995	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Carlos	Whitney	PO Box 195	Togak, AK 99678	None	None	Educational Scholarship	\$ 7,480.00
Charlier	Ara	PO Box 1097	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Corbett	Richard	PO Box 1216	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Corbett	William	PO Box 750	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Denslinger	Marc	PO Box 1086	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Finney	David	PO Box 111	Naknek, AK 99633	None	None	Educational Scholarship	\$ 4,560.00
Finney	Douglas	PO Box 1137	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 2,190.00
Folsom	Alisha	PO Box 696	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,470.00
Goodrich	Howard	General Delivery	Ekwok, AK 99580	None	None	Educational Scholarship	\$ 2,190.00
Heng (Hazenbang)	Katina	PO Box 31	Naknek, AK 99633	None	None	Educational Scholarship	\$ 4,560.00
Hill	Eric	PO Box 483	Naknek, AK 99633	None	None	Educational Scholarship	\$ 4,560.00
Himschoot	Alexander	PO Box 1061	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Hoefflein	Aurora	PO Box 825	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Hoefflein	Nicholai	PO Box 325	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Hunter	Nicholae	PO Box 847	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Hurburt	Megan	PO Box 1196	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Hurburt	Ward	PO Box 1196	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Isaacs	Melissa	PO Box 363	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Johnson	CaSandrea	PO Box 91	Dillingham, AK 99576	Great Niece of BBEDC Board Members	None	Educational Scholarship	\$ 4,560.00
Johnson	Colleen	PO Box 1175	Dillingham, AK 99576	Niece of BBEDC Board Member & Officer	None	Educational Scholarship	\$ 4,560.00
Junge	Laura	PO Box 381	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Kasaville	Linda	PO Box 981	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Kazmirowicz	Chelsey	PO Box 928	Cousin of BBEDC Board Member	None	None	Educational Scholarship	\$ 2,280.00
King	Malilda	PO Box 9	Ekwok, AK 99580	None	None	Educational Scholarship	\$ 4,560.00
Knutson	Tasha	PO Box 35	Ekwok, AK 99580	None	None	Educational Scholarship	\$ 4,560.00
LeFevre	April	PO Box 131	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 2,190.00
Lindow	Patricia	949 Elegik Street	Egegik, AK 99579	None	None	Educational Scholarship	\$ 4,560.00
Lisick	Deven	PO Box 385	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Lisick	Jorden	PO Box 818	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Lopez	Victoria	PO Box 351	Naknek, AK 99633	Niece of BBEDC Officer	None	Educational Scholarship	\$ 4,560.00
Mancuso	Mackenzie	PO Box 381	Naknek, AK 99633	None	None	Educational Scholarship	\$ 4,560.00
McGill	Amanda	PO Box 481	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Megli	Everet	PO Box 1475	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Mera	Colette	PO Box 1477	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Miller	Andrew	PO Box 1076	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 2,190.00
Miller	Ashley	PO Box 1551	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Miller	Jared	PO Box 1076	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 2,280.00
Mormson	Samuel	PO Box 161	King Salmon, AK 99613	None	None	Educational Scholarship	\$ 4,560.00
Munk	Ashley	PO Box 232	Naknek, AK 99633	None	None	Educational Scholarship	\$ 4,560.00
Nick	Timothy	PO Box 796	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00
Niedermeyer	Brittany	PO Box 303	King Salmon, AK 99613	None	None	Educational Scholarship	\$ 4,560.00
Niedermeyer	James	PO Box 303	King Salmon, AK 99613	None	None	Educational Scholarship	\$ 4,560.00
Nielsen	Debra	PO Box 103	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 2,280.00
Noel	Melanie	PO Box 1064	Dillingham, AK 99576	Cousin of BBEDC Board Member	None	Educational Scholarship	\$ 4,560.00
Noonkesser	William	PO Box 1035	Dillingham, AK 99576	None	None	Educational Scholarship	\$ 4,560.00

O'Connell	Sophie	P O Box 331	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 6,750.00
Oles	Shawn	P O Box 76	Manokotak, AK 99638	None	None	None	Educational Scholarship	\$ 4,560.00
Parker	Kinka	P O Box 72	Togik, AK 99678	None	None	None	Educational Scholarship	\$ 4,560.00
Peters	Kyle	P O Box 144	Naknek, AK 99633	None	None	None	Educational Scholarship	\$ 4,560.00
Phelps	Erika	P O Box 135	Naknek, AK 99633	None	None	None	Educational Scholarship	\$ 6,750.00
Phillips	Evelyn	P O Box 653	Dillingham, AK 99576	Great Niece of BBEDC Board Member	None	None	Educational Scholarship	\$ 4,560.00
Pieler	Carrie	P O Box 151	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,470.00
Prasartkaew	Kittinath	P O Box 883	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
Ramirez	Kristina	P O Box 1478	Dillingham, AK 99576	Step-daughter of BBEDC Officer	None	None	Educational Scholarship	\$ 4,560.00
Richard	Wesley	P O Box 485	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
Robinette	Jennifer	P O Box 763	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
Rogers	Jesse	P O Box 754	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
Rodgers	Matthew	P O Box 754	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
Savo	Kimberly	P O Box 109	Naknek, AK 99633	None	None	None	Educational Scholarship	\$ 6,750.00
Savo	Sara	P O Box 908	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,470.00
Savo	Shelley	P O Box 1137	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 2,190.00
Smeaton	Kristin	P O Box 382	Dillingham, AK 99576	Daughter of BBEDC Officer	None	None	Educational Scholarship	\$ 4,560.00
Sulton	Theodora	P O Box 52	Togik, AK 99678	None	None	None	Educational Scholarship	\$ 4,560.00
Tennyson	Reed	P O Box 167	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
Thomas	Robin	P O Box 9	King Salmon, AK 99613	None	None	None	Educational Scholarship	\$ 4,560.00
Tibbets	Allen	P O Box 253	King Salmon, AK 99613	None	None	None	Educational Scholarship	\$ 4,560.00
Todd	Rachel	P O Box 126	Naknek, AK 99633	None	None	None	Educational Scholarship	\$ 4,560.00
Tolbert	Cale	P O Box 324	King Salmon, AK 99613	None	None	None	Educational Scholarship	\$ 4,560.00
Vahle	Logan	P O Box 603	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
Venue	Angell	P O Box 287	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 6,750.00
Walton	Acacia	P O Box 465	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
Webb	Amber	P O Box 665	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
White	Nia	P O Box 326	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
Wilson	Dennis	P O Box 142	Dillingham, AK 99576	Nephew of BBEDC Board Member	None	None	Educational Scholarship	\$ 4,560.00
Wilson	Luke	P O Box 202	Naknek, AK 99633	None	None	None	Educational Scholarship	\$ 4,560.00
Wilson	Shawna	P O Box 234	Naknek, AK 99633	None	None	None	Educational Scholarship	\$ 4,560.00
Wright	Samuel	P O Box 695	Dillingham, AK 99576	None	None	None	Educational Scholarship	\$ 4,560.00
Zimin	Justin	P O Box 387	Naknek, AK 99633	Distant Cousin of BBEDC Board Member	None	None	Educational Scholarship	\$ 4,560.00
Zimin	Kameron	P O Box 70142	South Naknek, AK 99670	None	None	None	Educational Scholarship	\$ 4,560.00
Zimin	Ryann	P O Box 70003	South Naknek, AK 99670	None	None	None	Less Returns from Prior Years Awards	\$ (25,550.00)
								\$ 370,550.00

Application for Extension of Time To File an  
Exempt Organization Return

OMB No 1545-1709

► File a separate application for each return.

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

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

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

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

A corporation required to file Form 990-T and requesting an automatic 6-month extension - check this box and complete

Part I only . . . . . ► 

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

Enter filer's identifying number, see instructions

Type or print File by the due date for filing your return. See instructions	Name of exempt organization or other filer, see instructions HARVEY SAMUELSEN SCHOLARSHIP TRUST	Employer identification number (EIN) or 30-0065137
	Number, street, and room or suite no If a P O box, see instructions P.O. BOX 1464	Social security number (SSN)
	City, town or post office, state, and ZIP code For a foreign address, see instructions DILLINGHAM, AK 99576-1464	

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

0 4

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 4720- (individual)	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ► STACI FIESER, FINANCE OFFICER

Telephone No ► 907 842-4370

FAX No ► 907 842-4336

- If the organization does not have an office or place of business in the United States, check this box . . . . . ►
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) \_\_\_\_\_ If this is for the whole group, check this box . . . . . ►  If it is for part of the group, check this box . . . . . ►  and attach a list with the names and EINs of all members the extension is for

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 08/15, 2013, to file the exempt organization return for the organization named above. The extension is for the organization's return for  
 ►  calendar year 2012 or  
 ►  tax year beginning \_\_\_\_\_, 20\_\_\_\_\_, and ending \_\_\_\_\_, 20\_\_\_\_\_

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

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	3a \$ 11,391.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit	3b \$ 13,157.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System) See instructions	3c \$ 0

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

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

Form 8868 (Rev. 1-2013)

- If you are filing for an **Additional (Not Automatic) 3-Month Extension**, complete only Part II and check this box
- Note.** Only complete Part II if you have already been granted an automatic 3-month extension on a previously filed Form 8868

- If you are filing for an **Automatic 3-Month Extension**, complete only Part I (on page 1)

**Part II Additional (Not Automatic) 3-Month Extension of Time.** Only file the original (no copies needed)

Enter filer's identifying number, see instructions

<b>Type or print</b>  File by the due date for filing your return. See instructions	Name of exempt organization or other filer, see instructions  HARVEY SAMUELSEN SCHOLARSHIP TRUST	Employer identification number (EIN) or  30-0065137
	Number, street, and room or suite no. If a P O box, see instructions  P.O. BOX 1464	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions  DILLINGHAM, AK 99576-1464	

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

Application Is For	Return Code	Application Is For	Return Code
Form 990 or Form 990-EZ	01		
Form 990-BL	02	Form 1041-A	08
Form 4720 (individual)	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (sec. 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

**STOP! Do not complete Part II if you were not already granted an automatic 3-month extension on a previously filed Form 8868.**

- The books are in the care of ► STACI FIESER, FINANCE OFFICER  
Telephone No ► 907 842-4370 FAX No ► 907 842-4336
- 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

- 4 I request an additional 3-month extension of time until 11/15, 20 13 .
- 5 For calendar year 2012, or other tax year beginning \_\_\_\_\_, 20 \_\_\_\_\_, and ending \_\_\_\_\_, 20 \_\_\_\_\_
- 6 If the tax year entered in line 5 is for less than 12 months, check reason  Initial return  Final return  
 Change in accounting period
- 7 State in detail why you need the extension INFORMATION NECESSARY TO PREPARE A COMPLETE AND ACCURATE RETURN IS NOT YET AVAILABLE.

8a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions	8a \$ 11,391.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit and any amount paid previously with Form 8868	8b \$ 13,157.
c Balance Due. Subtract line 8b from line 8a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions	8c \$ 0

**Signature and Verification must be completed for Part II only.**

Under penalties of perjury, I declare that I have examined this form, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete, and that I am authorized to prepare this form

Signature ► E. ManyThaus

Title ► CPA

Date ► 07/29/2013

Form 8868 (Rev. 1-2013)