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

2012

Open to Public Inspection

For calendar year 2012 or tax year beginning , and ending

Name of foundation: Susan Scott Heyneman Foundation

A Employer identification number: 74-2364561

Number and street (or P O box number if mail is not delivered to street address): PO Box 7113

Room/suite:

B Telephone number (see instructions): 406-255-5368

City or town, state, and ZIP code: Billings MT 59103

C If exemption application is pending, check here ▶ ☐

G Check all that apply ☐ Initial return ☐ Initial return of a former public charity ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

D 1. Foreign organizations, check here ▶ ☐

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

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation ☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

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

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶ $ 518,874

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

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

Part I **Analysis of Revenue and Expenses** *(The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see 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)				
	2	Check ▶ ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments				
	4	Dividends and interest from securities	17,683	17,683		
	5 a	Gross rents				
	b	Net rental income or (loss)				
	6 a	Net gain or (loss) from sale of assets not on line 10	16,387			
	b	Gross sales price for all assets on line 6a 51,610				
	7	Capital gain net income (from Part IV, line 2)		16,387		
	8	Net short-term capital gain				
	9	Income modifications				
	10 a	Gross sales less returns and allowances				
	b	Less: Cost of goods sold				
	c	Gross profit or (loss) (attach schedule)				
	11	Other income (attach schedule)	844			
	12	**Total.** Add lines 1 through 11	34,914	34,070	0	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc.	5,039	2,520		2,519
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16 a	Legal fees (attach schedule)				
	b	Accounting fees (attach schedule)	867	500		367
	c	Other professional fees (attach schedule)				
	17	Interest				
	18	Taxes (attach schedule) (see instructions)	697	147		
	19	Depreciation (attach schedule) and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses (attach schedule)	128	128		
	24	**Total operating and administrative expenses.** Add lines 13 through 23	6,731	3,295	0	2,886
	25	Contributions, gifts, grants paid	23,700			23,700
	26	**Total expenses and disbursements.** Add lines 24 and 25	30,431	3,295	0	26,586
	27	Subtract line 26 from line 12:				
	a	**Excess of revenue over expenses and disbursements**	4,483			
	b	**Net investment income** (if negative, enter -0-)		30,775		
	c	**Adjusted net income** (if negative, enter -0-)			0	

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For Paperwork Reduction Act Notice, see instructions.

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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	7,425	12,178	12,178
	2	Savings and temporary cash investments			
	3	Accounts receivable ▶			
		Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶			
		Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons (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			
	10 a	Investments—U S and state government obligations (attach schedule)			
	b	Investments—corporate stock (attach schedule)	292,814	274,288	445,802
	c	Investments—corporate bonds (attach schedule)	30,395	30,395	29,848
	11	Investments—land, buildings, and equipment basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	12	Investments—mortgage loans			
	13	Investments—other (attach schedule)		18,907	31,046
	14	Land, buildings, and equipment. basis ▶			
		Less accumulated depreciation (attach schedule) ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers—see the instructions Also, see page 1, item I)	330,634	335,768	518,874
Liabilities	17	Accounts payable and accrued expenses			
	18	Grants payable			
	19	Deferred revenue			
	20	Loans from officers, directors, trustees, and other disqualified persons			
	21	Mortgages and other notes payable (attach schedule)			
	22	Other liabilities (describe ▶)			
	23	**Total liabilities** (add lines 17 through 22)	0	0	
Net Assets or Fund Balances		**Foundations that follow SFAS 117, check here ▶ ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24	Unrestricted			
	25	Temporarily restricted			
	26	Permanently restricted			
		Foundations that do not follow SFAS 117, check here ▶ ☒ and complete lines 27 through 31.			
	27	Capital stock, trust principal, or current funds	330,634	335,768	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund			
	29	Retained earnings, accumulated income, endowment, or other funds			
	30	**Total net assets or fund balances** (see instructions)	330,634	335,768	
	31	**Total liabilities and net assets/fund balances** (see instructions)	330,634	335,768	

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	330,634
2	Enter amount from Part I, line 27a	2	4,483
3	Other increases not included in line 2 (itemize) ▶ Unlocated reconciliation adjustment	3	651
4	Add lines 1, 2, and 3	4	335,768
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	335,768

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co)	(b) How acquired P—Purchase D—Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	See Attached Schedule			
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	51,610		35,223	16,387
b				
c				
d				
e				

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

	(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a				16,387
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** 16,387

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 . . . . **3** 0

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	27,296	516,362	0.052862
2010	21,515	476,437	0 045158
2009	24,099	417,309	0 057749
2008	26,343	512,752	0.051376
2007	26,916	609,593	0.044154

2	**Total** of line 1, column (d)	2	0 251299
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	0.050260
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	522,675
5	Multiply line 4 by line 3	5	26,270
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	308
7	Add lines 5 and 6	7	26,578
8	Enter qualifying distributions from Part XII, line 4	8	26,586

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)

1 a	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	308
c	All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0
3	Add lines 1 and 2	3	308
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	308
6	Credits/Payments:		
a	2012 estimated tax payments and 2011 overpayment credited to 2012 — 6a: 326		
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	326
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶	9	0
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶	10	18
11	Enter the amount of line 10 to be. **Credited to 2013 estimated tax** ▶ 18 **Refunded** ▶	11	0

Part VII-A Statements Regarding Activities

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

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If "Yes," attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ Not Applicable

14 The books are in care of ▶ Scott Family Services, Inc. Telephone no. ▶ (406) 255-5024

Located at ▶ 401 North 31st, Suite 700 Billings MT ZIP+4 ▶ 59101

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

			Yes	No
16	At any time during calendar year 2012, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1. If "Yes," enter the name of the foreign country ▶			

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

	File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.				Yes	No
1a	During the year did the foundation (either directly or indirectly)					
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes	☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes	☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes	☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes	☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes	☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days.)	☐ Yes	☒ No			
b	If any answer is "Yes" to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?			1b	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐					
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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?	☐ Yes	☒ No			
	If "Yes," list the years ▶ 20______ , 20______ , 20______ , 20______					
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 ▶ 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 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:				
	(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 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 instructions)?		**5b**	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ▶ ☐				
c	If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? *If "Yes," attach the statement required by Regulations section 53.4945–5(d).*	☐ 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? *If "Yes" to 6b, file Form 8870*		**6b**		X
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**	N/A	

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
First Interstate Bank PO Box 30918 Billings, MT 59116	Trustee	5,039		
Susan Scott Heyneman Bench Ranch Fishtail, MT 59028	Trustee 1.00			
John Heyneman Jr. 4100 Big Horn Avenue Sheridan, WY 82801	Trustee 1 00			

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

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 Not Applicable	
2	
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 Not Applicable	
2	
All other program-related investments See instructions 3	
Total. Add lines 1 through 3 ▶	0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	525,096
b	Average of monthly cash balances	1b	5,539
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	530,635
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	530,635
4	Cash deemed held for charitable activities. Enter 1 ½ % of line 3 (for greater amount, see instructions)	4	7,960
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	522,675
6	**Minimum investment return.** Enter 5% of line 5	6	26,134

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	26,134
2a	Tax on investment income for 2012 from Part VI, line 5	2a	308		
b	Income tax for 2012 (This does not include the tax from Part VI)	2b			
c	Add lines 2a and 2b			2c	308
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	25,826
4	Recoveries of amounts treated as qualifying distributions			4	
5	Add lines 3 and 4			5	25,826
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	25,826

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc , purposes:		
a	Expenses, contributions, gifts, etc.—total from Part I, column (d), line 26	1a	26,586
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	26,586
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	308
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	26,278

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				25,826
2	Undistributed income, if any, as of the end of 2012:				
a	Enter amount for 2011 only			18,390	
b	Total for prior years 20 ____, 20 ____, 20 ____				
3	Excess distributions carryover, if any, to 2012:				
a	From 2007				
b	From 2008				
c	From 2009				
d	From 2010				
e	From 2011				
f	**Total** of lines 3a through e	0			
4	Qualifying distributions for 2012 from Part XII, line 4: ▶ $ 26,586				
a	Applied to 2011, but not more than line 2a			18,390	
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				8,196
e	Remaining amount distributed out of corpus				
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	0			
b	Prior years' undistributed income Subtract line 4b from line 2b		0		
c	Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
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			0	
f	Undistributed income for 2012. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2013				17,630
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				
10	Analysis of line 9.				
a	Excess from 2008				
b	Excess from 2009				
c	Excess from 2010				
d	Excess from 2011				
e	Excess from 2012				

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

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

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

	Tax year	Prior 3 years			
	(a) 2012	(b) 2011	(c) 2010	(d) 2009	(e) Total
2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					0
b 85% of line 2a					0
c Qualifying distributions from Part XII, line 4 for each year listed					0
d Amounts included in line 2c not used directly for active conduct of exempt activities					0
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					0
3 Complete 3a, b, or c for the alternative test relied upon.					
a "Assets" alternative test—enter					
(1) Value of all assets					0
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					0
b "Endowment" alternative test—enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					0
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)					0
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					0
(3) Largest amount of support from an exempt organization					0
(4) Gross investment income					0

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).)

Susan Scott Heyneman

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:

Susan Scott Heyneman Bench Ranch Fishtail, MT 59028

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

See Statement #1

c Any submission deadlines:

None

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

See Statement #1

Part XV Supplementary Information (continued)

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

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year*				
Community Congregational Church Absarokee, MT 59001		501(c)(3)	Operating Support	1,000
Humanities Montana Billings, MT 59812		501(c)(3)	Operating Support	1,000
Yellowstone Art Museum Billings, MT 59101		501(c)(3)	Operating Support	2,500
Shakespeare in the Park Bozeman, MT 59717		501(c)(3)	Operating Support	2,000
Billings Food Bank Billings, MT 59101		501(c)(3)	Operating Support	2,500
NPRC Endowment Billings, MT 59101		501(c)(3)	Endowment Support	1,000
Montana Rescue Mission Billings , MT 59103		501(c)(3)	Operating Support	3,000
NPRC Billings , MT 59107		501(c)(3)	Operating Support	1,000
Mental Health Center HUB Billings, MT 59103		501(c)(3)	Operating Support	1,500
Absarokee PTA Absarokee, MT 59001		501(c)(3)	Operating Support	250
KS&A (Kleinfelter's Syndrome Assoc) Aurora, CO 80046		501(c)(3)	Operating Support	1,500
Total . See Attached Statement . . . . ▶ **3a**				23,700
b *Approved for future payment*				
Total . . . . ▶ **3b**				0

Susan Scott Heyneman Foundation 74-2364561 Page 1 of 1

Continuation of Part XV, Line 3a (990-PF) - Grants and Contributions Paid During the Year

Recipient(s) paid during the year

Name The Land Institute				
Street				
City Salina	**State** KS	**Zip Code** 67401	**Foreign Country**	
Relationship	**Foundation Status** 501(c)(3)			
Purpose of grant/contribution Operating Support				**Amount** 2,000
Name Headwaters				
Street				
City Billings	**State** MT	**Zip Code** 59101	**Foreign Country**	
Relationship	**Foundation Status** 501(c)(3)			
Purpose of grant/contribution Operating Support				**Amount** 2,000
Name Billings Family Services				
Street				
City Billings	**State** MT	**Zip Code** 59102	**Foreign Country**	
Relationship	**Foundation Status** 501(c)(3)			
Purpose of grant/contribution Operating Support				**Amount** 250
Name Center For Vital Community				
Street				
City Sheridan	**State** WY	**Zip Code** 82801	**Foreign Country**	
Relationship	**Foundation Status** 501(c)(3)			
Purpose of grant/contribution Operating Support				**Amount** 1,200
Name Billings Studio Theater				
Street				
City Billings	**State** MT	**Zip Code** 59102	**Foreign Country**	
Relationship	**Foundation Status** 501(c)(3)			
Purpose of grant/contribution Operating Support				**Amount** 500
Name Venture Theater				
Street				
City Billings	**State** MT	**Zip Code** 59102	**Foreign Country**	
Relationship	**Foundation Status** 501(c)(3)			
Purpose of grant/contribution Operating Support				**Amount** 500

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	Related or exempt function income (See instructions)
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	17,683	
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			18	844	
8 Gain or (loss) from sales of assets other than inventory			18	16,387	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)		0		34,914	0

13 Total. Add line 12, columns (b), (d), and (e) 13 34,914

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

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See instructions)
	Not Applicable

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

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

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

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

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

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: L. M. Heyneman
Date: 8/12/13
Title:

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
Timothy Leuthold		7/15/2013		P00738917

Firm's name ▶ Scott Family Services Inc — Firm's EIN ▶ 71-0919978

Firm's address ▶ PO Box 7113, Billings, MT 59103 — Phone no 406-255-5368

Part I, Line 11 (990-PF) - Other Income

		844	0
	Description	Revenue and Expenses per Books	Net Investment Income
1	Partnership Distribution	844	0

Part I, Line 11 (990-PF) - Other Income

	0
	Adjusted Net Income
1	

Part I, Line 16b (990-PF) - Accounting Fees

		867	500	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income
1	Scott Family Services, Inc.	867	500	

Part I, Line 16b (990-PF) - Accounting Fees

	367
	Disbursements for Charitable Purposes (Cash Basis Only)
1	367

Part I, Line 18 (990-PF) - Taxes

		697	147	0
	Description	Revenue and Expenses per Books	Net Investment Income	Adjusted Net Income
1	Foreign Taxes withheld	147	147	
2	Tax on investment income	550		
3	Income tax			

Part I, Line 18 (990-PF) - Taxes

	0 Disbursements for Charitable Purposes
1	
2	
3	

Part I, Line 23 (990-PF) - Other Expenses

		128 Revenue and Expenses per Books	128 Net Investment Income	0 Adjusted Net Income
	Description			
1	Commissions	128	128	

Part I, Line 23 (990-PF) - Other Expenses

	0 Disbursements for Charitable Purposes
1	

Susan Scott Heyneman Foundation

74-2364561

Part II, Line 10a (990-PF) - Investments - U.S. and State Government Obligations

	Federal		0	0	0	0
	State/Local		0	0	0	0

	Description	Num Shares/ Face Value	Book Value Beg of Year	Book Value End of Year	FMV Beg. of Year	FMV End of Year
1	See attached schedule		0		0	

Susan Scott Heyneman Foundation

74-2364561

Part II, Line 10b (990-PF) - Investments - Corporate Stock

			292,814	274,288	455,901	445,802
	Description	Num. Shares/ Face Value	Book Value Beg of Year	Book Value End of Year	FMV Beg of Year	FMV End of Year
1	See attached schedule		292,814	274,288	455,901	445,802

Susan Scott Heyneman Foundation

74-2364561

Part II, Line 10c (990-PF) - Investments - Corporate Bonds

				30,395	30,395	28,859
	Description	Interest Rate	Maturity Date	Book Value Beg of Year	Book Value End of Year	FMV Beg. of Year
1	See attached schedule			30,395	30,395	28,859

Part II, Line 10c (990-PF) - Investments - Corporate Bonds

29,848

	FMV End of Year
1	29,848

Part II, Line 13 (990-PF) - Investments - Other

0 18,907 31,046

	Asset Description	Basis of Valuation	Book Value Beg of Year	Book Value End of Year	FMV End of Year
1	See Attached Schedule		0	18,907	31,046

Susan Scott Heyneman Foundation
Form 990PF
Part XV
Question #2

The Susan Scott Heyneman Foundation is operated exclusively for religious, educational, environmental, or other charitable purposes. Limitations are not placed on geographical areas, charitable fields, or amounts requested.

Tax Worksheet

(01/01/2012 To 12/31/2012)

Tax ID : 74-2364561

Account Name: Susan Scott Heyneman Foundation

Account Number : 321159

State of Domicile : Montana

Generation Skipping : N/A

Administrator : Cynthia Reierson

Accountant : Tim Leuthold

Scott Family Services
Billings MT 59103

* * Schedule D * *

Shares/PV	Asset Sold	Date Acquired	How Acq	Date Sold	Holding Period	Sales Proceeds	Original Cost	Realized Gain/ Loss
100	Altria Group Inc 02209S103	07/11/2002	P	09/13/2012	Long	3,205.12	1,039.20	2,165.92
350	Honda Motors Co Limited Sponsored ADR 438128308	01/25/2005	P	10/05/2012	Long	10,490.21	9,242.97	1,247.24
485.120	Invesco Equally-Weighted S&P 500 Fund- A 00142J818	11/18/1986	F	04/12/2012	Long	15,926.33	9,306.16	6,620.17
100	Mid-America Apartment Communities REIT 59522J103	08/09/2007	P	06/19/2012	Long	6,617.73	4,970.02	1,647.71
45	Philip Morris International 718172109	07/11/2002	S	03/19/2012	Long	3,810.77	1,065.60	2,745.17
15	Philip Morris International 718172109	06/09/2004	S	03/19/2012	Long	1,270.26	395.16	875.10
190	Unitedhealth Group Inc 91324P102	11/09/2006	P	07/16/2012	Long	10,289.32	9,203.60	1,085.72
						51,609.74	35,222.71	16,387.03

How Acquired: F - Free Receipt, B - Beginning Inventory, C - Call, G - Gift,
L - Payment Made (Liability), P - Purchase, R - Reinvestment, S - Spinoff, U - Undetermined

Gain/Loss Summary :

	Short Term GL		Long Term GL
Gains From Sales :	0.00	Gains From Sales :	16,387.03
Losses From Sales :	0.00	Losses From Sales :	0.00
Common Funds :	0.00	Common Funds :	0.00
Short Term Gains :	0.00	Long Term Gain :	16,387.03
Short Term Losses :	0.00	Long Term Losses :	0.00
Net Short Term G/L:	0.00	Net Long Term G/L :	16,387.03
Capital Gain Dist :	0.00	Capital Gain Dist :	0.00

Account Holdings As Of

Filtered By Account = 321159.Susan Scott Heyneman Foundation
Sorted By Account Number

Date Run 07/15/2013 | Time Printed 10 14 03 AM

Account Name : Susan Scott Heyneman Foundation | **As Of : 12/31/2012** | **Account Number : 321159**

Shares	Asset Description		Cost	Market	Unr Gain Loss	Est Ann Income	Yield
		Prices As Of : 12/31/2012					
	Taxable Money Market Funds						
11,101 38	Northern Institutional Gov Select 01%		11,101.38	11,101.38	0 00	1 11	0 01%
	Sub Total	**$**	**11,101.38**	**11,101.38**	**0.00**	**1.11**	**0.01%**
	Corporate Bonds						
10,000	Morgan Stanley Dean Witter 5 300% 03/01/13		10,417 30	10,054 65	-362.65	530 00	5 27%
10,000	American Express Credit Corp 5 875% 05/02/13		9,752.50	10,180 56	428 06	587 50	5 77%
	Sub Total	**$**	**20,169.80**	**20,235.21**	**65.41**	**1,117.50**	**5.52%**
	Corporate Bnds-Variable Rate						
10,000	Morgan Stanley Fltg Rate 9 250% 09/30/29 Floating Variable Rate Monthly		10,225.00	9,612 50	-612 50	856 80	8 91%
	Sub Total	**$**	**10,225.00**	**9,612.50**	**-612.50**	**856 80**	**8.91%**
	Common Stock						
200	3M Company		4,725 96	18,570.00	13,844.04	472 00	2 54%
165	Air Products & Chemicals		5,683.99	13,863.30	8,179 31	422 40	3 05%
150	Allergan Inc		14,499.39	13,759.50	-739 89	30 00	0 22%
500	Altria Group Inc		8,681 13	15,720 00	7,038 87	880.00	5 60%
435	AT&T Inc		13,019.64	14,663.85	1,644 21	783 00	5 34%
265	Baker Hughes Inc		14,839.66	10,824 64	-4,015.02	159 00	1 47%
250	Boeing Company		8,821.62	18,840 00	10,018 38	485 00	2 57%
400	Bristol Myers Squibb Company		4,978 63	13,036.00	8,057 37	560 00	4 30%
185	Deere & Company		14,951 36	15,987 70	1,036 34	340 40	2 13%
600	General Electric Company		14,604 77	12,594 00	-2,010 77	456 00	3 62%
342	JP Morgan Chase & Company		4,570 10	15,037 43	10,467 33	410 40	2 73%
200	Kimberly Clark Corporation		10,892 41	16,886 00	5,993 59	592.00	3 51%
400	Medtronic Inc		14,458 70	16,408.00	1,949 30	416 00	2 54%
600	Microsoft Corporation		221 99	16,025 82	15,803 83	552 00	3 44%
200	NextEra Energy Inc		4,128.33	13,838 00	9,709 67	480 00	3 47%
800	Nordic Amer Tanker Shipping		18,611 29	7,000.00	-11,611 29	960 00	13 71%

Account Holdings As Of

Filtered By Account = 321159 Susan Scott Heyneman Foundation
Sorted By · Account Number

Date Run 07/15/2013 Time Printed 10 14 03 AM

Account Name : Susan Scott Heyneman Foundation **As Of : 12/31/2012** **Account Number : 321159**

Prices As Of : 12/31/2012

Shares	Asset Description	Cost	Market	Unr Gain Loss	Est Ann Income	Yield
200	Pepsico Inc	2,072.13	13,686 00	11,613.87	430 00	3 14%
185	Philip Morris International	7,097.97	15,473 40	8,375 43	629 00	4 07%
200	Schlumberger Limited	1,649 75	13,859.72	12,209 97	220 00	1 59%
300	Sempra Energy Inc	5,034 73	21,282 00	16,247 27	720 00	3 38%
230	United Technologies Corporation	6,039 46	18,862 30	12,822 84	492 20	2 61%
185	Unitedhealth Group Inc	6,770 60	10,034 40	3,263 80	157 25	1 57%
120	WYNN Resorts LTD	8,499 20	13,498 80	4,999 60	240 00	1 78%
	Sub Total	**$ 194,852.81**	**339,750.86**	**144,898.05**	**10,886.65**	**3.20%**
	Foreign Common Stock					
300	Ingersoll- Rand PLC	11,559 00	14,388 00	2,829 00	252 00	1 75%
175	Nestle SA- Sponsored ADR	10,054 59	11,394 55	1,339 96	310 09	2 72%
200	Royal Dutch Shell PLC-ADR A	10,609 38	13,790 00	3,180.62	584 80	4 24%
120	Siemens A G Sponsered	10,193 31	13,136.40	2,943 09	343 60	2.62%
400	Vale SA - Sp ADR	11,059 14	8,384 00	-2,675 14	123 93	1 48%
656	Vodafone Group PLC-SP ADR	8,052 31	16,524 64	8,472 33	984 06	5 96%
	Sub Total	**$ 61,527.73**	**77,617.59**	**16,089.86**	**2,598.48**	**3.35%**
	ETF - Equity Funds					
400	Claymore S&P Global Water ETF	10,013 67	8,894 40	-1,119 27	180 40	2 03%
	Sub Total	**$ 10,013 67**	**8,894.40**	**-1,119.27**	**180.40**	**2.03%**
	ETF - US Large Cap Equity Fund					
300	MFC Powershares QQQ Trust Unit Series 1	7,894 18	19,539 03	11,644 85	246 83	1 26%
	Sub Total	**$ 7,894.18**	**19,539.03**	**11,644.85**	**246.83**	**1 26%**
	ETF - Alternative Investment					
200	Mid-America Apartment Communities REIT	9,940 03	12,950 00	3,009 97	556 00	4.29%
	Sub Total	**$ 9,940.03**	**12,950.00**	**3,009.97**	**556.00**	**4.29%**
	Limited Partnerships					
400	Plains All American Pipeline, LP	8,966.40	18,096 00	9,129 60	868 00	4 80%

Account Holdings As Of

Filtered By Account = 321159 Susan Scott Heyneman Foundation
Sorted By Account Number

Date Run · 07/15/2013 Time Printed · 10 14 03 AM

Account Name : Susan Scott Heyneman Foundation **As Of : 12/31/2012** **Account Number : 321159**

Prices As Of : 12/31/2012

Shares	Asset Description		Cost	Market	Unr Gain Loss	Est Ann Income	Yield
	Sub Total	$	8,966.40	18,096.00	9,129.60	868.00	4 80%
	Grand Total	$	334,691.00	517,796.97	183,105.97	17,311.77	3.34%

Principal Cash: 56,234.84 *Income Cash:* -56,234.84 *Invested Income:* 0 00

Susan Scott Heyneman Foundation

74-2364561

Part VIII, Line 1 (990-PF) - Compensation of Officers, Directors, Trustees and Foundation Managers

	Name	Check "X" if Business	Street	City	State	Zip Code	Foreign Country	Title	Avg Hrs Per Week	Compensation	Benefits	Expense Account
										5,039	0	0
1	First Interstate Bank	X	PO Box 30918	Billings	MT	59116		Trustee		5,039		
2	Susan Scott Heyneman		Bench Ranch	Fishtail	MT	59028		Trustee	1 00			
3	John Heyneman Jr		4100 Big Horn Avenue	Sheridan	WY	82801		Trustee	1 00			

Form **8868**

(Rev January 2013)

Department of the Treasury

Application for Extension of Time To File an Exempt Organization Return

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

OMB No 1545-1709

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

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

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

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

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

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

Enter filer's identifying number, see instructions

Type or print	Name of exempt organization or other filer, see instructions. Susan Scott Heyneman Foundation	Employer identification number (EIN) or 74-2364561
File by the due date for filing your return See instructions	Number, street, and room or suite no If a P O box, see instructions PO Box 7113	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. Billings MT 59103	

Enter the Return code for the return that this application is for (file a separate application for each return) . . . 04

Application Is For	Return Code	Application Is For	Return Code
Form 990 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 ▶ Scott Family Services, Inc

Telephone No ▶ (406) 255-5024 FAX No ▶

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

1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/15/2013, 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 ______, and ending ______.

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

3a	If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits See instructions	**3a**	$ 308
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**	$ 326
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.