See a Social Security Number? Say Something!
Report Privacy Problems to https://public.resource.org/privacy
Or call the IRS Identity Theft Hotline at 1-800-908-4490

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: SOKA 'PIIWA FOUNDATION

A Employer identification number: 83-0321664

Number and street (or P O box number if mail is not delivered to street address): P.O. BOX 6769

Room/suite:

B Telephone number: (307) 674-0848

City or town, state, and ZIP code: SHERIDAN, WY 82801

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)* ▶$ 2,351,282.

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))

			(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				
	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	78,861.	78,861.		STATEMENT 1
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	104,427.			
	b	Gross sales price for all assets on line 6a 2,395,596.				
	7	Capital gain net income (from Part IV, line 2)		104,427.		
	8	Net short-term capital gain				
	9	Income modifications				
	10a	Gross sales less returns and allowances				
	b	Less Cost of goods sold				
	c	Gross profit or (loss)				
	11	Other income				
	12	**Total.** Add lines 1 through 11	183,288.	183,288.	0.	
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	0.	0.	0.	0.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees				
	b	Accounting fees STMT 2	4,596.	2,298.	0.	2,298.
	c	Other professional fees				
	17	Interest	11.	0.	0.	0.
	18	Taxes STMT 3	233.	17.	0.	0.
	19	Depreciation and depletion				
	20	Occupancy				
	21	Travel, conferences, and meetings				
	22	Printing and publications				
	23	Other expenses STMT 4	13,341.	13,341.	0.	0.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	18,181.	15,656.	0.	2,298.
	25	Contributions, gifts, grants paid	112,500.			112,500.
	26	**Total expenses and disbursements.** Add lines 24 and 25	130,681.	15,656.	0.	114,798.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	52,607.			
	b	**Net investment income** (if negative, enter -0-)		167,632.		
	c	**Adjusted net income** (if negative, enter -0-)			0.	

AUG 2 2013

OGDEN, UT

SCANNED AUG 2 8 2013

223501
12-05-12 LHA **For Paperwork Reduction Act Notice, see instructions.**

3 8

Part II **Balance Sheets** Attached schedules and amounts in the description column should be for end-of-year amounts only

			Beginning of year	End of year	
			(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1	Cash - non-interest-bearing			
	2	Savings and temporary cash investments	74,427.	101,947.	101,947.
	3	Accounts receivable ▶ Less: allowance for doubtful accounts ▶			
	4	Pledges receivable ▶ Less: allowance for doubtful accounts ▶			
	5	Grants receivable			
	6	Receivables due from officers, directors, trustees, and other disqualified persons			
	7	Other notes and loans receivable ▶ Less: allowance for doubtful accounts ▶			
	8	Inventories for sale or use			
	9	Prepaid expenses and deferred charges			
	10a	Investments - U.S. and state government obligations			
	b	Investments - corporate stock STMT 5	1,649,411.	2,129,549.	1,675,529.
	c	Investments - corporate bonds STMT 6	848,583.	593,532.	573,806.
	11	Investments - land, buildings, and equipment basis ▶ Less accumulated depreciation ▶			
	12	Investments - mortgage loans			
	13	Investments - other	200,000.		
	14	Land, buildings, and equipment: basis ▶ Less accumulated depreciation ▶			
	15	Other assets (describe ▶)			
	16	**Total assets** (to be completed by all filers)	2,772,421.	2,825,028.	2,351,282.
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			
	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	2,772,421.	2,825,028.	
	28	Paid-in or capital surplus, or land, bldg., and equipment fund	0.	0.	
	29	Retained earnings, accumulated income, endowment, or other funds	0.	0.	
	30	**Total net assets or fund balances**	2,772,421.	2,825,028.	
	31	**Total liabilities and net assets/fund balances**	2,772,421.	2,825,028.	

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	2,772,421.
2	Enter amount from Part I, line 27a	2	52,607.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2,825,028.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,825,028.

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 STATEMENT	P	VARIOUS	VARIOUS
b	SEE ATTACHED STATEMENT	P	VARIOUS	VARIOUS
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	1,311,453.		1,276,828.	34,625.
b	1,084,143.		1,014,341.	69,802.
c				
d				
e				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				34,625.
b				69,802.
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	104,427.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6): If gain, also enter in Part I, line 8, column (c). If (loss), enter -0- in Part I, line 8	3	N/A

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

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

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

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

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

1 Enter the appropriate amount in each column for each year; see 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	26,260.	2,309,743.	.011369
2010	64,390.	2,200,170.	.029266
2009	44,275.	1,699,177.	.026057
2008	152,559.	2,323,711.	.065653
2007	281,177.	3,067,640.	.091659

2	Total of line 1, column (d)	2	.224004
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	.044801
4	Enter the net value of noncharitable-use assets for 2012 from Part X, line 5	4	2,231,888.
5	Multiply line 4 by line 3	5	99,991.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,676.
7	Add lines 5 and 6	7	101,667.
8	Enter qualifying distributions from Part XII, line 4	8	114,798.

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 ▶ ☐ 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 c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b).			1	1,676.
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	1,676.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)			4	0.
5 **Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-			5	1,676.
6 Credits/Payments:				
a 2012 estimated tax payments and 2011 overpayment credited to 2012	6a	1,429.		
b Exempt foreign organizations - tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c	2,800.		
d Backup withholding erroneously withheld	6d			
7 Total credits and payments. Add lines 6a through 6d			7	4,229.
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	
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	2,553.
11 Enter the amount of line 10 to be: **Credited to 2013 estimated tax** ▶	2,553.	**Refunded** ▶	11	0.

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? *If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.*	1b		X
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. ▶ $ 0. (2) On foundation managers. ▶ $ 0. e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers. ▶ $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *If "Yes," attach a detailed description of the activities.*	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
4a 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? N/A	4b		
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	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ▶ WY			
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 ▶ N/A

14 The books are in care of ▶ KAREN KOYAMA-BREEN Telephone no. ▶ (307)674-0848

Located at ▶ P.O. BOX 6769, SHERIDAN, WY ZIP+4 ▶ 82801

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** - Check here ▶ ☐

and enter the amount of tax-exempt interest received or accrued during the year ▶ 15 N/A

			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)?	N/A	1b		
	Organizations relying on a current notice regarding disaster assistance check here	▶ ☐			
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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 ▶ ____, ____, ____, ____				
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.)	N/A	2b		
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ▶ ____, ____, ____, ____				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ 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.)*	N/A	3b		
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 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)? ☐ 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)? N/A **5b**

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? N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

6a Did the foundation, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract? ☐ Yes ☒ No

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** X (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? ☐ Yes ☒ No

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction? N/A **7b**

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

1 List all officers, directors, trustees, foundation managers and their compensation.

(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
GEORGE D. WIDENER P.O. BOX 2565 COLUMBIA FALLS, MT 59912	TRUSTEE 0.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1). If none, enter "NONE."

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ▶ 0

223551
12-05-12

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services. If none, enter "NONE."

(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 ▶ 0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 N/A	
2	
3	
4	

Part IX-B Summary of Program-Related Investments

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ▶	0.

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	2,162,367.
b	Average of monthly cash balances			1b	103,509.
c	Fair market value of all other assets			1c	
d	**Total** (add lines 1a, b, and c)			1d	2,265,876.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.		
2	Acquisition indebtedness applicable to line 1 assets			2	0.
3	Subtract line 2 from line 1d			3	2,265,876.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)			4	33,988.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4			5	2,231,888.
6	**Minimum investment return.** Enter 5% of line 5			6	111,594.

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	111,594.
2a	Tax on investment income for 2012 from Part VI, line 5	2a	1,676.		
b	Income tax for 2012. (This does not include the tax from Part VI.)	2b			
c	Add lines 2a and 2b			2c	1,676.
3	Distributable amount before adjustments. Subtract line 2c from line 1			3	109,918.
4	Recoveries of amounts treated as qualifying distributions			4	0.
5	Add lines 3 and 4			5	109,918.
6	Deduction from distributable amount (see instructions)			6	0.
7	**Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1			7	109,918.

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	114,798.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	114,798.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	1,676.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	113,122.

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				109,918.
2 Undistributed income, if any, as of the end of 2012.				
a Enter amount for 2011 only			104,533.	
b Total for prior years: _____, _____, _____		0.		
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: ▶$ 114,798.				
a Applied to 2011, but not more than line 2a			104,533.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2012 distributable amount				10,265.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2012 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
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		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2011. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2012. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2013				99,653.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2007 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2013.** Subtract lines 7 and 8 from line 6a	0.			
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					
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:

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

c Any submission deadlines:

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

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*				
SEE STATEMENT 8				112,500.
Total			▶ 3a	112,500.
b *Approved for future payment*				
NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	(e) Related or exempt function income
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	78,861.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	104,427.	
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.		183,288.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 183,288.

(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).
	N/A

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
		N/A	

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
N/A		

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

▶ 8-14-2013 ▶ Presidential Partner

Signature of officer or trustee Date Title

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

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
BRIAN FLEMING		8/12/13		P00448170

Firm's name ▶ DELOITTE TAX LLP

Firm's EIN ▶ 86-1065772

Firm's address ▶ 555 17TH STREET, SUITE 3600
DENVER, CO 80202

Phone no. 303-312-5400

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
MORGAN STANLEY	78,861.	0.	78,861.
TOTAL TO FM 990-PF, PART I, LN 4	78,861.	0.	78,861.

FORM 990-PF ACCOUNTING FEES STATEMENT 2

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	4,596.	2,298.	0.	2,298.
TO FORM 990-PF, PG 1, LN 16B	4,596.	2,298.	0.	2,298.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FOREIGN TAX WITHHELD	17.	17.	0.	0.
FEDERAL	216.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	233.	17.	0.	0.

FORM 990-PF OTHER EXPENSES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
MANAGEMENT FEE	13,218.	13,218.	0.	0.
BANK SERVICE CHARGES	3.	3.	0.	0.
POSTAGE/DELIVERY	120.	120.	0.	0.
TO FORM 990-PF, PG 1, LN 23	13,341.	13,341.	0.	0.

FORM 990-PF CORPORATE STOCK STATEMENT 5

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT 7	2,129,549.	1,675,529.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,129,549.	1,675,529.

FORM 990-PF CORPORATE BONDS STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT 7	593,532.	573,806.
TOTAL TO FORM 990-PF, PART II, LINE 10C	593,532.	573,806.

Soka'piiwa Foundation
December 31, 2012

Stocks	Book Value	Fair Market Value
Aflac Inc	$1,704 46	$1,699 84
Allstate Corp	$4,549 46	$4,619 55
Altria Group Inc	$2,035 68	$2,358 00
Ameren Corp	$4,426 61	$4,300 80
Amgen Inc	$20 108 24	$22,498 20
Apollo Group Inc	$6 672.81	$5,020 80
Apple Inc	$2,861 97	$7,450 42
Assurant Inc	$9,760 18	$9,195 50
AT&T Inc	$25,045 55	$25,080 24
Bank of America Corp	$185,751 62	$203,175 00
Bed Bath & Beyond Inc	$1,392 70	$1,341 84
Big Lots Inc Ohio	$4,249 96	$3,244 44
Brown Forman Corp	$4,849 49	$5,502.75
Celgene Corp	$3,011 90	$3,138 80
CitiGroup Inc	$420,853 25	$99,691 20
Comcast Corp Class A New	$4 180 56	$4,296 40
Cree Research Inc	$49 942 17	$58,751 42
CVS Corp	$2,133 94	$2,224 10
Cyberonics Corp	$2,205 40	$2,573 97
Discover Fincl Svcs	$5,721 83	$7,016 10
Discovery Communications Ser A	$1,325 52	$1,523 52
Disney Walt Company	$10 957 80	$13,493 09
Dollar Tree Inc	$6,679 31	$6,854 64
Domtar Corp	$3,807 93	$4,008 96
Donnelley R R & Sons Co	$25,741 36	$17,926 06
Ebay Inc	$2,112.19	$2,243 89
Eli Lilly & Co	$1,334 88	$1,331 64
Equifax Inc	$1,627 75	$1,731 84
Estee Lauder Co	$3 862.35	$4,010 62
Expedia Inc New	$1,320 58	$1,351 68
Exxon Mobil Corp	$28,891 97	$29,600 10
Fastenal Co	$1,889 84	$2,379 15
Foot Locker Inc	$1,620 64	$1,606 00
Gabelli Nat Res	$100,000 00	$68,300 50
Gamestop Corp	$12,825 42	$14 150 76
Gap Inc	$14,404 06	$20,672.64
Garmin Ltd Shs	$1,281 08	$1,426 25
General Electric Co	$213,580 74	$125,940 00
H&R Block Inc	$4,548 12	$4 716 78
Harley Davidson Inc	$2,548 32	$2,636 82
Health Net Inc A	$1,377 60	$1,312 20
Home Depot Inc	$18,970 57	$31,914 60
Humana Inc	$1,708 43	$1,372.60
Ingersoll Rand Co	$2,350 17	$2,445 96
Intel Corp	$36,611 49	$33 651 84
Iron Mountain Inc (De)	$22,578 82	$21,766 05
JPMorgan Chase & Co	$6,625 40	$6,639 33
Kohl's Corp	$13 114 79	$10,959 90
L-3 Communications Holding Inc	$3 112 83	$3,218 04
Lexmark Intl Inc New A	$7,339 97	$8,209 26
Magellan Health Services Inc	$2,490 27	$2,303 00
Marathon Petroleum Corp	$4,213 70	$5,292 00
McKesson Corp	$1,325 25	$1,454 40
Medifast Inc	$1,330 71	$1,266 72
Metro PCS Communications	$1,555 99	$1,530 76
Monster Beverage Corp Com	$4,054 41	$3,434 60
Moodys Corp	$1,342 99	$1,459 28
Motorola Solutions Inc	$14,825 39	$15,868 80
Mylan Inc	$2,902 18	$3,101 85
Nacco Industries A	$1,512 40	$1,699 32
Newell Rubbermaid Inc	$3,227 98	$3,407 31
Northrop Grumman	$6,462.77	$7,231 06
O'Reilly Automotive	$2,099 40	$2,503 76
Papa Johns Intl Inc	$1,549 97	$1,702 83
Peabody Energy Corp	$94,858 32	$71 847 00
Petsmart Inc	$1,508 69	$1,571 82
Pfizer Incorporated	$24,841 00	$32,176 74
Philip Morris Intl Inc	$2,464 34	$4,182 00
PNM Resources Inc (Hldg Co)	$2,585 56	$2,502.22
PPG Industries Inc	$2,930 17	$3,248 40
Priceline com Inc New	$3,644 78	$3,722 34
Prudential Financial Inc	$102,006 50	$102,000 00
Ross Stores Inc	$7,075 99	$8,762 58
Safeway Inc Com New	$29,652 83	$31,820 31
Schlumberger Ltd	$92,519 89	$69 298 60
Seagate Technology Hldgs	$1,516 69	$1 429 74
Sherwin Williams Company Ohio	$8,626 73	$9,229 20
Stage Stores Inc	$1,321 44	$1,288 56
Suncoke Energy Inc Com	$9,230 57	$11,567 78
Tech Data Corp	$2,317 88	$2,413 09
Telephone & Data System	$102,006 50	$98,240 00
Tesoro Petroleum	$4,334 38	$7 488 50
TJX Cos Inc New	$7,007 78	$10,018 20
Torchmark Corp	$10 827 51	$13 434 20
Travelers Companies	$27,242 77	$32,247 18
United States Stl Corp New	$170,755 83	$121,635 00
USA Mobility Inc	$1,950 54	$2,032 32
Verisign Inc	$7,118 49	$6,482 94
Visa Inc	$6,332.39	$10,155 86
Vonage Holdings Corp	$1,924 50	$2,016 87
Wal-Mart Stores Inc	$2,182 73	$2 729 20
Whirlpool Corp	$2,451 48	$2,543 75
Williams Co Inc	$1,263 28	$1,407 82
Wyndham Worldwide Corp	$4,291 93	$5,214 58
Wynn Resorts Ltd	$26,787 88	$28,459 97
Yahoo Inc	$1,468.43	$1,532.30
Total Stocks	$2,129,548 92	$1,675,528 85

Corporate Bonds	Book Value	Fair Market Value
CFI Trigger Jump	$100,000 00	$91,350 00
Fifth Third Cap Trust IV	$206,572 00	$200,000 00
Goldman Sachs Capital II	$161,500 00	$156,216 00
Suntrust Pfd Cap I	$125,460.00	$126,240.00
Total Corporate Bonds	$593,532 00	$573,806 00

Recipient	***Address***	***Relationship To Soka'piiwa***	***Purpose***	***Status***		***Amount***
Children's Dream Fund	PO Box 1881 St. Petersburg, FL 33731	None	Making dreams come true for seriously ill children.	501(c)(3)	$	3,500.00
First Best Place	540 Nucleus Avenue Columbia Falls, MT 59912	None	Grassroots organization building quality of life amenities	501(c)(3)	$	1,500 00
Intercollegiate Horse Show Association	PO Box 108 Fairfield, CT 06824	None	Promote competition for riders of all skills & ability.	501(c)(3)	$	2,500.00
Montana Environmental Information Center	PO Box 1184 Helena, MT 59624	None	Advocate for protecting & restoring Montana's natural env	501(c)(3)	$	4,500 00
Montana Land Reliance	PO Box 460 Big Fork, MT 59911	None	Acquire & manage conservation easements in Montana	501(c)(3)	$	1,000.00
Montana Trout Unlimited	111 North Higgins #500 Missoula, MT 59802	None	Advocate for healthy watersheds & restorationg projects	501(c)(3)	$	10,000 00
Montana Wilderness Association	80 South Warren Helena, MT 59601	None	Protecting Montana's wilderness heritage, quiet beauty an traditions.	501(c)(3)	$	20,000.00
National Cowboy Museum	1700 Northeast 63rd Street Oklahoma City, OK 73111	None	Preserving history & cultures of the American West	501(c)(3)	$	1,500 00
The Nature Conservancy of Montana	32 Ewing Street Helena, MT 59601	None	Rocky Mountain Front	501(c)(3)	$	10,000 00
Natural Resources Defense Council	40 West 20th Street New York City, NY 10011	None	Safeguard the Earth	501(c)(3)	$	6,000 00
Neighbors Helping Neighbors	PO Box 303 Choteau, MT 59422	None	Offering Assistance to Teton County members.	501(c)(3)	$	4,000 00
Northern Plains Resource Council	220 S. 27th Street, Suite A Billings, MT 59101	None	Protection of water quality and family farms & ranches	501(c)(3)	$	2,000 00
Old Trail Museum	823 North Main Choteau, MT 59422	None	Preserve, Research & Interpret the Rocky Mountain Front	501(c)(3)	$	18,000 00
Reining Horse Sports Foundation	3000 NW 10th Street Oklahoma City, OK 73107	None	Research & Education - Handicap Riding Program	501(c)(3)	$	5,000 00
Rocky Mountain Elk Foundation	5705 Grant Creek Road Missoula, MT 59808	None	Wildlife conservation	501(c)(3)	$	12,000 00
Rocky Mountain Front Weed Roundtable	PO Box 663 Choteau, MT 59422	None	Conservation management of noxious weeds on the Rock Front.	501(c)(3)	$	1,000.00
Teton Medical Center	915 4th Street NW Choteau, MT 59422	None	Building a Future for Hometown Quality Care	501(c)(3)	$	4,000 00
University of Montana Foundation	PO Box 7159 Missoula, MT 59807	None	Wildlife Biology Program	501(c)(3)	$	5,000 00
Western Rivers Conservancy	71 SW Oak Street Portland, OR 97204	None	Protection of outstanding river ecosystems.	501(c)(3)	$	1,000 00
			Total Contributions Paid		$	112,500 00

Schedule D
Soka'piiwa Foundation
2012

Capital Gains and Losses
83-0321664

Part I Short-Term Capital Gains and Losses
- Assets Held 1 Year or Less

(a) Description of Property	(b) Date(s) acquired	(c) Date Sold	(d) Sales Price	(e) Cost Basis	(f) Gain (Loss)
Sold 0 65 shares of Suncoke Energy Inc Com	1/17/12	01/17/2012	8 46	8 09	$0 37
Sold 0 266 shares of Telephone & Data Systems	40843	01/25/2012	7 52	21 99	($14 47)
Sold 553 shares of Penney J C Co	10/27/11	02/06/2012	22,749 92	18,355 89	$4,394 03
Sold 508 shares of JPMorgan Chase & Co	10/27/11	02/06/2012	19,326 78	18,208 29	$1,118 49
Sold 121 shares of Genuine Parts Co	10/27/11	02/06/2012	7,860 83	7,096 89	$763 94
Sold 102 shares of Chubb Corp	10/27/11	02/06/2012	6,945 46	7,086 96	($141 50)
Sold 119 shares of Accenture Plc Ireland	10/27/11	02/06/2012	6,892 66	7,118 66	($226 00)
Sold 40 shares of Precision Castparts Corp	10/27/11	02/06/2012	6,847 78	6,963 73	($115 95)
Sold 206 shares of Centerpoint Energy Inc	10/27/11	02/06/2012	3,870 68	4,367 47	($496 79)
Sold 61 shares of Cons Edison Inc (Hldg Co)	10/27/11	02/06/2012	3,591 82	3,627 65	($35 83)
Sold 68 shares of Manhattan Assoc Inc	10/27/11	02/06/2012	3,155 04	2,797 27	$357 77
Sold 84 shares of Comtech Telecommunications New	10/27/11	02/06/2012	2,751 70	2,812 88	($61 18)
Sold 111 shares of Gamestop Corp	10/27/11	02/06/2012	2,594 00	2,812 68	($218 68)
Sold 209 shares of Activision Blizzard Inc	10/27/11	02/06/2012	2,577 84	2,803 67	($225 83)
Sold 4 shares of Magellan Health Services Inc	10/27/11	02/06/2012	193 44	211 94	($18 50)
Sold 3 shares of Donnelley R R & Sons	12/16/11	02/06/2012	36 63	42 99	($6 36)
Sold 113 shares of CVR Energy Inc	10/27/11	02/17/2012	3,278 54	2,835 74	$442 80
Schlumberger Rev Cvt Exchange, Rec'd 1,000 shares	3/24/11	02/28/2012	98,602 89	88,751 90	$9,850 99
Sold $100,000 US West Capital Funding	11/29/11	02/28/2012	96,848 00	92,655 00	$4,193 00
Sold $100,000 Rev Cvt on BAC	12/28/11	02/28/2012	60,817 00	41,695 12	$19,121 88
Sold 12 shares of Atrion Corp	10/27/11	03/07/2012	2,467 46	2,756 84	($289 38)
Sold 36 shares of Cons Edison Inc (Hldg Co)	10/27/11	03/07/2012	2,086 16	2,140 91	($54 75)
Sold 14 shares of Laclede Group Inc New	10/27/11	03/07/2012	569 64	575 93	($6 29)
Sold 1 share of Magellan Health Services Inc	10/27/11	03/07/2012	47 08	52 98	($5 90)
Sold $100,000 PNC Fin Svcs	7/29/11	03/20/2012	104,227 00	101,872 00	$2,355 00
Sold 278 shares of Assurant Inc	10/27/11	04/11/2012	10,830 66	10,842 55	($11 89)
Sold 281 shares of Duke Energy Corp Hlding Co	10/27/11	04/11/2012	5,716 39	5,773 93	($57 54)
Sold 81 shares of Valero Energy Cp Dela New	2/6/12	04/11/2012	1,950 23	1,999 48	($49 25)
Sold 26 shares of Devon Energy Corp New	2/6/12	04/11/2012	1,787 45	1,648 26	$139 19
Sold 165 shares of IDT Corp Cl B	2/6/12	04/11/2012	1,496 76	1,541 56	($44 80)
Sold 19 shares of National Oilwell Varco Inc	2/6/12	04/11/2012	1,472 27	1,555 45	($83 18)
Sold 49 shares of Nash Finch Co	2/6/12	04/11/2012	1,276 02	1,460 64	($184 62)
Sold 22 shares of Cons Edison Inc (Hldg Co)	10/27/11	04/11/2012	1,259 75	1,308 33	($48 58)
Sold 171 shares of CNO Finl Group Inc Com	2/6/12	04/11/2012	1,244 75	1,264 13	($19 38)
Sold 57 shares of Viropharma Inc	3/7/12	04/11/2012	1,242 92	1,665 36	($422 44)
Sold 3 shares of Washington Post Company Cl B	2/6/12	04/11/2012	1,136 55	1,151 22	($14 67)
Sold 13 shares of Brown Forman Corp Cl B	2/6/12	04/11/2012	1,081 67	1,086 95	($5 28)
Sold 50 shares of Centerpoint Energy Inc	10/27/11	04/11/2012	956 25	1,060 06	($103 81)
Sold 47 shares of Intl Fcstone Inc Com	2/6/12	04/11/2012	935 49	1,271 94	($336 45)
Sold 17 shares of Baker Hughes Inc	2/6/12	04/11/2012	695 68	875 91	($180 23)
Sold 14 shares of Synnex Corp	2/6/12	04/11/2012	519 49	529 99	($10 50)
Sold 146 shares of Abbott Laboratories	2/6/12	06/07/2012	8,944 16	8,087 54	$856 62
Sold 173 shares of Raytheon Co (new)	2/6/12	06/07/2012	8,866 64	8,516 48	$350 16
Sold 60 shares of Exxon Mobil Corp	10/27/11	06/07/2012	4,833 49	4,873 88	($40 39)
Sold 42 shares of Colgate Palmolive Co	2/6/12	06/07/2012	4,159 16	3,832 78	$326 38
Sold 81 shares of Total Fina Elf SA	2/6/12,4/11/12	06/07/2012	3,543 73	4,317 00	($773 27)
Sold 21 shares of Ralph Lauren Corp Cl A	10/27/11	06/07/2012	3,011 44	3,300 80	($289 36)
Sold 31 shares of Wellpoint Inc	2/6/12,3/7/12,4/11/12	06/07/2012	2,086 10	2,057 70	$28 40
Sold 29 shares of AT&T Inc	10/27/11,4/11/12	06/07/2012	1,001 55	848 75	$152 80
Sold 43 shares of Synnex Corp	2/6/12	06/07/2012	1,441 78	1,627 82	($186 04)
Sold 25 shares of Estee Lauder Co Inc Cl A	2/6/12	06/07/2012	1,374 22	1,441 17	($66 95)
Sold 66 shares of Telephone and Data Systems Inc	10/27/11	06/07/2012	1,369 37	1,442 76	($73 39)
Sold 49 shares of Halliburton Co	2/6/12	06/07/2012	1,366 57	1,808 58	($442 01)
Sold 33 shares of Baker Hughes Inc	2/6/12	06/07/2012	1,333 46	1,700 30	($366 84)
Sold 26 shares of Cliffs Natural Resources Inc	2/6/12,4/11/12	06/07/2012	1,277 40	1,909 18	($631 78)
Sold 43 shares of Microsoft Corp	2/6/12,4/11/12	06/07/2012	1,260 25	1,289 60	($29 35)
Sold 18 shares of ConocoPhillips	2/6/12	06/07/2012	974 43	1,028 24	($53 81)
Sold 2 shares of Washington Post Company Cl B	2/6/12	06/07/2012	721 78	767 48	($45 70)
Sold 5 shares of Humana Inc	2/6/12	06/07/2012	390 91	427 46	($36 55)
Sold 9 shares of Phillips 66 Com	4/30/12	06/07/2012	293 05	246 50	$46 55
Sold 4 shares of Aetna Inc (New)(Ct)	2/6/12	06/07/2012	169 53	175 31	($5 78)
Sold 1 share of Amerigroup Corp	2/6/12	06/07/2012	60 12	67 22	($7 10)
Sold 0 33 shares of Duke Energy Corp	10/27/11	06/29/2012	22 83	20 53	$2 30
Redomiciling of CoffeeCo Shares to De Masters Blenders Merger/Amsterdam	2/6/12, 4/11/12	06/29/2012	1,538 60	2,200 71	($662 11)
Sold 0 4 shares of Hillshire Brands Co	2/6/12	01/12/1900	11 80	12 33	($0 53)
Redemption of Called JPM Chase Capital Bond, $100,000	5/30/12	07/12/2012	100,000 00	102,509 00	($2 509 00)
Sold 157 shares of De Master Blndr	2/6/12,4/11/12	07/16/2012	1,725 55	1,538 60	$186 95
2,700 shares rec'd from Redemption of Peabody Energy Corp Rev Cvt	2/28/12	07/31/2012	96,555 32	96,650 25	($94 93)
$100,000 Redemption of United Sts Stl Cp Rev Cvt	2/28/12	07/31/2012	92,133 83	90,755 96	$1,377 87
Sold 25 shares of Amerigroup Corp	2/6/12	03/07/2012	2,250 20	1,679 08	$571 12
Sold 226 shares of Marsh & Mclennan Cos Inc	10/27/11	08/08/2012	7,660 72	7,079 72	$581 00
Sold 13 shares of Washington Post Company	2/6/12	08/08/2012	4,555 28	4,988 62	($433 34)
Sold 86 shares of Halliburton Co	2/6/12	08/08/2012	2,955 69	3,174 23	($218 54)

Sold 80 shares of Assurant Inc	10/27/11	08/08/2012	2,878 12	3,150 95	($272 83)
Sold 45 shares of UnitedHealth Gp Inc	4/11/12,6/7/12	08/08/2012	2,362 06	2,608 42	($246 36)
Sold 31 shares of Humana Inc	2/6/12	08/08/2012	2,015 43	2,650 27	($634 84)
Sold 53 shares of Aetna Inc	2/6/12	08/08/2012	1,980 58	2,322 85	($342 27)
Sold 32 shares of Baxter Intl Inc	2/6/12	08/08/2012	1,877 71	1,818 88	$58 83
Sold 11 shares of Ralph Lauren Corp Cl A	10/27/11	08/08/2012	1,648 56	1,728 99	($80 43)
Sold 68 shares of Best Buy Co	4/11/12,6/7/12	08/08/2012	1,335 49	1,450 08	($114 59)
Sold 31 shares of Hillshire Brands Co	6/29/12	08/08/2012	783 71	967 69	($183 98)
Sold 10 shares of Estee Lauder Co	2/6/12	08/08/2012	538 45	576 47	($38 02)
Sold 358 shares of Coca-Cola Enterprises Inc New	2/6/12,3/7/12	09/05/2012	10,627 49	9,722 10	$905 39
Sold 108 shares of Fidelity Natl Information SE	2/6/12,3/7/12	09/05/2012	3,452 27	3,233 15	$219 12
Sold 7 shares of Washington Post Company Cl B	2/6/12,3/7/12	09/05/2012	2,446 40	2,698 68	($252 28)
Sold 38 shares of American Express Co	2/6/12,3/7/12,6/7/12	09/05/2012	2,181 59	1,965 87	$215 72
Sold 6 shares of Humana Inc	2/6/12	09/05/2012	426 00	512 96	($86 96)
Sold 3 shares of JPMorgan Chase & Co	4/11/12	09/05/2012	111 56	131 63	($20 07)
Sold $100,000 Lincoln Natl Corp Ind	6/28/12	10/31/2012	101,988 00	98,436 50	$3,551 50
Sold 120 shares of Western Refining, Inc	2/6/12	11/08/2012	3,104 08	2,154 52	$949 56
Sold 95 shares of Ameren Corp (Hldg Co)	2/6/12	11/08/2012	2,995 77	3,003 78	($8 01)
Sold 726 shares of Hewlett Packard	12,3/7/12,4/11/12,6/7/12	11/21/2012	8,484 64	18,931 39	($10,446 75)
Sold 0 45 shares of Iron Mountain	11/21/12	11/21/2012	14 63	14 79	($0 16)
Sold $100,000 General Elec	8/28/12	11/29/2012	106,715 00	104,677 00	$2,038 00
Sold 515 shares of Donnelley R R & Sons Co	12/16/11	12/06/2012	4,752 05	7,380 16	($2,628 11)
Sold 114 shares of Safeway Inc Com New	4/11/12	12/06/2012	2,063 35	2,291 96	($228 61)
Sold 32 shares of Verizon Communications	11/8/12	12/06/2012	1,415 34	1,366 72	$48 62
Sold $100,000 Caterpillar Inc Reverse Convert	8/30/12	12/18/2012	100,143 45	95,080 56	$5,062 89
Sold $100,000 of Barclays Bk Plc	9/25/12	12/26/2012	95,265 50	94,866 50	$399 00
Total Short Term Capital Gain (Loss)			1,311,452 85	1,276,827 68	34,625 17

Schedule D
Soka'piiwa Foundation
2012

Capital Gains and Losses
83-0321664

Part II Long-Term Capital Gains and Losses

- Assets Held More Than 1 Year

(a) Description of Property	(b) Date(s) acquired	(c) Date Sold	(d) Sales Price	(e) Cost Basis	(f) Gain (Loss)
Sold 590 shares of AT&T Inc	6/10/08,10/21/08,10/23/(	02/06/2012	17,611 93	20,844 70	($3,232 77)
Sold 154 shares of Travelers Companies Inc Com	10/23/09	02/06/2012	9,148 64	7,902 66	$1,245 98
Sold 187 shares of Kohls Corporation Wisc	5/14/04	02/06/2012	9,135 26	9,918 33	($783 07)
Sold 37 shares of Intl Business Machines Corp	10/25/10	02/06/2012	7,143 45	5,213 79	$1,929 66
Sold 158 shares of Verizon Comm	10/21/08,10/23/09	02/06/2012	5,999 35	4,180 46	$1,818 89
Sold 76 shares of Wal Mart Stores Inc	10/25/10	02/06/2012	4,702 04	4,128 70	$573 34
Sold 45 shares of Philip Morris Intl Inc	10/23/09	02/06/2012	3,465 29	2,217 90	$1,247 39
Sold 40 shares of Lockheed Martin Corp	10/23/09	02/06/2012	3,410 82	2,872 15	$538 67
Sold 90 shares of Wal Mart Stores Inc	10/25/10	03/07/2012	5,353 43	4,889 25	$464 18
Sold 21 shares of Intl Business Machines Corp	10/25/10	03/07/2012	4,156 69	2,959 18	$1,197 51
Sold 33 shares of Verizon Communications	10/23/09	03/07/2012	1,285 32	903 98	$381 34
Sold 6 shares of Lockheed Martin Corp	10/23/09	03/07/2012	525 57	430 82	$94 75
Sold 9 shares of Home Depot Inc	10/25/10	03/07/2012	423 35	283 49	$139 86
Sold 3 shares of Philip Morris Intl Inc	10/23/09	03/07/2012	251 33	147 86	$103 47
Sold 1 share of Bristol Myers Squibb Co	10/25/10	03/07/2012	32 19	27 12	$5 07
Sold 123 shares of Bristol Myers Squibb Co	10/25/10	04/11/2012	4,002 33	3,335 49	$666 84
Sold 31 shares of Lockheed Martin Corp	10/23/09	04/11/2012	2,755 14	2,225 92	$529 22
Sold 32 shares of Home Depot Inc	10/25/10	04/11/2012	1,591 90	1,007 98	$583 92
Sold 6 shares of Intl Business Machines Corp	10/25/10	04/11/2012	1,220 47	845 48	$374 99
Sold 2 shares of Tech Data Corp	10/25/10	04/11/2012	105 51	87 47	$18 04
Sold 1,400 shares of Sunoco Inc	6/19/08	04/30/2012	68,159 08	45,753 34	$22,405 74
Sold 69 shares of Lockheed Martin Corp	10/23/09	06/07/2012	5,738 28	4,654 46	$1,083 82
Sold 21 shares of Intl Business Machines Corp	10/25/10	06/07/2012	4,085 57	2,959 18	$1,126 39
Sold 33 shares of Home Depot	10/25/10	06/07/2012	1,692 62	1,039 48	$653 14
Sold 14 shares of AT&T Inc	10/23/09,10/25/10	06/07/2012	483 51	378 95	$104 56
Sold 57 shares of Wal Mart Stores Inc	10/25/10	08/08/2012	4,238 49	3,096 53	$1,141 96
Sold 15 shares of Intl Business Machines Corp	10/25/10	08/08/2012	2,982 36	2,113 68	$868 68
Sold 3 shares of Apple Inc	10/23/09	08/08/2012	1,858 75	613 28	$1,245 47
Sold $100,000 Nationwide Finl Svcs	6/7/11	08/29/2012	101,490 00	97,926 00	$3,564 00
Sold 336 shares of Big Lots Inc Ohio	10/27/11	09/05/2012	10,180 81	12,526 18	($2,345 37)
Sold 37 shares of Wal Mart Stores Inc	10/25/10	09/05/2012	2,722 14	2,010 03	$712 11
Sold 28 shares of Lockheed Martin Corp	10/23/09	09/05/2012	2,553 50	2,010 51	$542 99
Sold 39 shares of Home Depot Inc	10/25/10	09/05/2012	2,218 66	1,228 47	$990 19
Sold 2 shares of Philip Morris Intl Inc	10/23/09	09/05/2012	178 91	98 57	$80 34
Sold $100,000 Wachovia Captl Trust	2/28/11	09/10/2012	98,498 50	93,336 00	$5,162 50
Sold $100,000 Citigroup Contingent Coupon Mkt Linked CD	6/28/11	09/20/2012	95,375 00	100,000 00	($4,625 00)
Sold $100,000 Citigroup Market-Linked CD	3/18/11	09/20/2012	95,375 00	100,000 00	($4,625 00)
Sold $100,000 BBVA Intl Pref	4/4/11	09/24/2012	74,618 50	86,756 00	($12,137 50)
Sold $200,000 BAC Capital Tr XIV	6/3/10,10/22/10	10/31/2012	165,170 00	142,878 00	$22,292 00
Sold 834 shares of Lowes Companies Inc	10/27/11	11/08/2012	27,051 26	18,262 85	$8,788 41
Sold 605 shares of Altria Group Inc	10/27/11	11/08/2012	19,015 81	16,421 15	$2,594 66
Sold 448 shares of Gap Inc	10/27/11	11/08/2012	15,403 68	8,485 17	$6,918 51
Sold 30 shares of Autozone Inc	10/12/11,10/27/11	11/08/2012	11,389 00	9,887 43	$1,501 57
Sold 99 shares of O'Reilly Automotive Inc New	10/27/11	11/08/2012	8,831 46	7,422 85	$1,408 61
Sold 91 shares of Tyler Technologies Inc	10/27/11	11/08/2012	4,265 54	2,835 41	$1,430 13
Sold 90 shares of Fastenal Co	10/27/11	11/08/2012	3,791 54	3,335 01	$456 53
Sold 83 shares of Usana Health Sciences Inc	10/27/11	11/08/2012	3,463 27	2,789 60	$673 67
Sold 56 shares of Home Depot Inc	10/25/10	11/08/2012	3,421 84	1,763 96	$1,657 88
Sold 78 shares of Amer Financial Gp Inc Hldg Co	10/27/11	11/08/2012	2,988 30	2,817 47	$170 83
Sold 68 shares of IAC Interactivecorp Com	10/27/11	11/08/2012	2,936 56	2,795 60	$140 96
Sold 115 shares of Cardtronics Inc	10/27/11	11/08/2012	2,820 05	2,843 41	($23 36)
Sold 55 shares of Torchmark Corp	10/27/11	11/08/2012	2,737 60	2,290 44	$447 16
Sold 78 shares of URS Corp New	10/27/11	11/08/2012	2,725 37	2,831 77	($106 40)
Sold 173 shares of Hewlett Packard	10/27/11	11/08/2012	2,390 32	4,598 15	($2,207 83)
Sold 56 shares of Laclede Group Inc New	10/27/11	11/08/2012	2,191 93	2,303 72	($111 79)
Sold 13 shares of Ralph Lauren Corp Cl A	10/27/11	11/08/2012	1,964 44	2,043 36	($78 92)
Sold 78 shares of Centerpoint Energy Inc	10/27/11	11/08/2012	1,611 01	1,653 70	($42 69)
Sold 63 shares of Pfizer Inc	10/25/10	11/08/2012	1,527 08	1,110 25	$416 83
Sold 20 shares of Wal Mart Stores Inc	10/25/10	11/08/2012	1,455 96	1,086 50	$369 46
Sold 62 shares of Telephone and Data Systems Inc	10/27/11	11/08/2012	1,397 02	1,355 32	$41 70
Sold 21 shares of Duke Energy Corp New	10/27/11	11/08/2012	1,326 60	1,294 53	$32 07
Sold 26 shares of Bristol Myers Quibb Co	10/25/10	11/08/2012	836 10	705 06	$131 04
Sold 513 shares of Hewlett Packard	10/27/11	11/21/2012	5,995 35	13,634 98	($7,639 63)
Redemption of $100,000 Bank of America Step Up	5/25/11	11/27/2012	100,000 00	100,000 00	$0 00
Sold 130 shares of Torchmark Corp	10/27/11	12/06/2012	6,648 19	5,413 76	$1,234 43
Sold 66 shares of Lockheed Martin Corp	10/23/09,10/25/10,10/27	12/06/2012	5,995 86	5,056 29	$939 57
Sold 162 shares of Gap Inc	10/27/11	12/06/2012	5,150 88	3,068 30	$2,082 58
Sold 81 shares of Dollar Tree Inc	10/27/11	12/06/2012	3,266 30	3,201 32	$64 98
Sold 67 shares of Bristol Myers Squibb Co	10/25/10	12/06/2012	2,182 72	1,816 89	$365 83
Sold 51 shares of Fastenal Co	10/27/11	12/06/2012	2,130 50	1,889 84	$240 66
Sold 14 shares of Visa Inc Cl A	10/27/11	12/06/2012	2,078 31	1,304 88	$773 43
Sold 61 shares of Pfizer Inc	10/25/10	12/06/2012	1,564 61	1,075 00	$489 61

Sold 19 shares of Travelers Companies Inc Com	10/23/09	12/06/2012	1,388 02	975 00	$413 02
Sold 37 shares of Big Lots Inc Ohio	10/27/11	12/06/2012	1,112 11	1,379 37	($267 26)
Sold 9 shares of Home Depot Inc	10/27/11	12/06/2012	576 62	335 52	$241 10
Sold 5 shares of O'Reilly Automotive Inc New	10/27/11	12/06/2012	454 15	374 89	$79 26
Sold 3 shares of Altria Group Inc	10/27/11	12/06/2012	99 76	81 43	$18 33
SEC v Bank of America Corp Fair Fund		12/12/2012	18 56	0 00	$18 56
Total Short Term Capital Gain (Loss)			$1,084,143 37	$1,014,341 57	$69,801 80

Form **8868**
(Rev. January 2013)
Department of the Treasury
Internal Revenue Service

Application for Extension of Time To File an Exempt Organization Return

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

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.

Type or print File by the due date for filing your return See instructions	Name of exempt organization or other filer, see instructions. SOKA 'PIIWA FOUNDATION	Employer identification number (EIN) or 83-0321664
	Number, street, and room or suite no. If a P.O. box, see instructions. P.O. BOX 6769	Social security number (SSN)
	City, town or post office, state, and ZIP code. For a foreign address, see instructions. SHERIDAN, WY 82801	

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 ▶ KAREN KOYAMA-BREEN
  P.O. BOX 6769, SHERIDAN, WY - 82801
  Telephone No. ▶ (307)674-0848 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 AUGUST 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	$ 2,717.
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	$ 1,429.
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	$ 2,800.

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

LHA **For Privacy Act and Paperwork Reduction Act Notice, see instructions.** Form **8868** (Rev. 1-2013)