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EXTENDED TO AUGUST 17, 2015

Return of Private Foundation

or Section 4947(a)(1) Trust Treated as Private Foundation

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Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

Form 990-PF

Department of the Treasury
Internal Revenue Service

For calendar year 2014 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 or province, country, and ZIP or foreign postal code SHERIDAN, WY 82801		C If exemption application is pending, check here ☐
G Check all that apply: ☐ Initial return ☐ Final return ☐ Address change ☐ Initial return of a former public charity ☐ Amended return ☐ 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) \$ 2,443,100.	J Accounting method: ☒ Cash ☐ Accrual ☐ Other (specify) _____	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)
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		77,840.	77,840.		STATEMENT 1
5a Gross rents					
b Net rental income or (loss)					
6a Net gain or (loss) from sale of assets not on line 10		<625.>			
b Gross sales price for all assets on line 6a		2,953,098.			
7 Capital gain net income (from Part IV, line 2)			0.		
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		77,215.	77,840.	0.	
13 Compensation of officers, directors, trustees, etc		0.		0.	0.
14 Other employee salaries and wages					
15 Pension plans, employee benefits					
16a Legal fees					
b Accounting fees STMT 2		4,630.	2,315.	0.	2,315.
c Other professional fees					
17 Interest		242.	242.	0.	0.
18 Taxes STMT 3		28,043.	1.	0.	0.
19 Depreciation and depletion					
20 Occupancy					
21 Travel, conferences, and meetings					
22 Printing and publications					
23 Other expenses STMT 4		19,082.	19,082.	0.	0.
24 Total operating and administrative expenses. Add lines 13 through 23		51,997.	21,640.	0.	2,315.
25 Contributions, gifts, grants paid		233,000.			233,000.
26 Total expenses and disbursements. Add lines 24 and 25		284,997.	21,640.	0.	235,315.
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements		<207,782.>			
b Net investment income (if negative, enter -0-)			56,200.		
c Adjusted net income (if negative, enter -0-)				0.	

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11-24-14

LHA For Paperwork Reduction Act Notice, see instructions.

Form 990-PF (2014)

SCANNED AUG 24 2015

P 4

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		43,026.	115,495.	115,495.
	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	1,720,173.	1,864,101.	1,569,687.
	c	Investments - corporate bonds	STMT 6	1,287,134.	862,955.	757,918.
	11	Investments - land, buildings, and equipment: basis ▶				
	Less: accumulated depreciation ▶					
12	Investments - mortgage loans					
13	Investments - other					
14	Land, buildings, and equipment: basis ▶					
	Less: accumulated depreciation ▶					
15	Other assets (describe ▶)					
16	Total assets (to be completed by all filers - see the instructions. Also, see page 1, item I)		3,050,333.	2,842,551.	2,443,100.	
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		3,050,333.	2,842,551.	
	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		3,050,333.	2,842,551.		
31	Total liabilities and net assets/fund balances		3,050,333.	2,842,551.		

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	3,050,333.
2	Enter amount from Part I, line 27a	2	<207,782.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2,842,551.
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	2,842,551.

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 STATEMENT 8	P	VARIOUS	VARIOUS
b SEE STATEMENT 8	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 1,536,356.		1,531,655.	4,701.
b 1,416,742.		1,422,068.	<5,326.>
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			4,701.
b			<5,326.>
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	<625.>
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))
2013	32,430.	2,446,899.	.013254
2012	113,122.	2,231,888.	.050684
2011	26,260.	2,309,743.	.011369
2010	64,390.	2,200,170.	.029266
2009	44,275.	1,699,177.	.026057

2 Total of line 1, column (d)	2	.130630
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	.026126
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5	4	2,578,091.
5 Multiply line 4 by line 3	5	67,355.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	562.
7 Add lines 5 and 6	7	67,917.
8 Enter qualifying distributions from Part XII, line 4	8	235,315.

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)		1	562.
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).			
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	562.
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	562.
6 Credits/Payments:			
a 2014 estimated tax payments and 2013 overpayment credited to 2014	6a	5,217.	
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	5,217.	
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	4,655.	
11 Enter the amount of line 10 to be: Credited to 2015 estimated tax ☒ 4,655. 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?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for the 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.		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation. ☒ \$ 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		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		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV	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	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 2014 or the taxable year beginning in 2014 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see 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? Website address N/A	13	X	
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	
16	At any time during calendar year 2014, 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? See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22.1). If "Yes," enter the name of the foreign country	16	Yes	No X

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)? Organizations relying on a current notice regarding disaster assistance check here N/A	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2014?	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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? ☐ 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 2014 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 2014.) 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 2014?	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 4945(d)(4)(A)? (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)?

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

6b

X

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?

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

7b

N/A

b If "Yes," did the foundation receive any proceeds or have any net income attributable to the transaction?

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

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

(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	TRUSTEE			
P.O. BOX 2565				
COLUMBIA FALLS, MT 59912	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

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.

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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	2,433,510.
b	Average of monthly cash balances	1b	183,841.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	2,617,351.
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	2,617,351.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	39,260.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,578,091.
6	Minimum investment return. Enter 5% of line 5	6	128,905.

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	128,905.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	562.
b	Income tax for 2014. (This does not include the tax from Part VI.)	2b	
c	Add lines 2a and 2b	2c	562.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	128,343.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	128,343.
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	128,343.

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	235,315.
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	235,315.
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	562.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	234,753.

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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				128,343.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			117,134.	
b Total for prior years:				
2012 , _____, _____		67,223.		
3 Excess distributions carryover, if any, to 2014:				
a From 2009				
b From 2010				
c From 2011				
d From 2012				
e From 2013				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$ 235,315.				
a Applied to 2013, but not more than line 2a			117,134.	
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 2014 distributable amount				118,181.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2014 (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		67,223.		
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		67,223.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2013. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2015				10,162.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required - see instructions)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2010				
b Excess from 2011				
c Excess from 2012				
d Excess from 2013				
e Excess from 2014				

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment				
Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
SEE STATEMENT 9				233,000.
Total			▶ 3a	233,000.
b Approved for future payment				
NONE				
Total			▶ 3b	0.

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

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

[illegible]

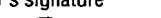
- 2a** Is the foundation directly or indirectly affiliated with, or related to, one or more tax-exempt organizations described in section 501(c) of the Code (other than section 501(c)(3)) or in section 527? ☐ Yes ☒ No
- b** If "Yes," complete the following schedule.

(a) Name of organization	(b) Type of organization	(c) Description of relationship
N/A		

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.

Sign Here  18/14/05  president
 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 BRIAN FLEMING	Preparer's signature 	Date 8/10/15	Check ☐ if self-employed	PTIN 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. 303-292-5400

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 1

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	(A) REVENUE PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME
MORGAN STANLEY	77,840.	0.	77,840.	77,840.	77,840.
TO PART I, LINE 4	77,840.	0.	77,840.	77,840.	77,840.

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	4,630.	2,315.	0.	2,315.
TO FORM 990-PF, PG 1, LN 16B	4,630.	2,315.	0.	2,315.

FORM 990-PF TAXES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FEDERAL INCOME TAX	28,042.	0.	0.	0.
FOREIGN TAX WITHHELD	1.	1.	0.	0.
TO FORM 990-PF, PG 1, LN 18	28,043.	1.	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 FEES	19,083.	19,083.	0.	0.
BANK SERVICE CHARGES	<1.>	<1.>	0.	0.
TO FORM 990-PF, PG 1, LN 23	19,082.	19,082.	0.	0.

FORM 990-PF	CORPORATE STOCK	STATEMENT	5
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT 7	1,864,101.	1,569,687.
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,864,101.	1,569,687.

FORM 990-PF	CORPORATE BONDS	STATEMENT	6
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DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT 7	862,955.	757,918.
TOTAL TO FORM 990-PF, PART II, LINE 10C	862,955.	757,918.

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FORM 990-PF, PART II, LINE 10b	CORPORATE STOCK	Book Value	Fair Market Value
3M Company		\$2,655.60	\$3,122.08
Aecom Technology Corp		\$2,960.67	\$2,702.93
AGL Resources Inc		\$3,727.97	\$3,979.23
Altria Group Inc		\$3,108.19	\$3,399.63
American Cap Agy Corp		\$100,000.00	\$99,800.00
Ameriprise Fincl Inc		\$3,800.57	\$4,496.50
Anthem Inc fka Wellpoint Inc		\$2,362.32	\$2,513.40
Apple Inc		\$1,957.49	\$1,876.46
Assurant Inc		\$4,862.96	\$8,964.33
AT&T Inc		\$48,062.18	\$46,824.46
Ball Corp		\$10,196.78	\$10,907.20
Bed Bath & Beyond Inc		\$5,337.77	\$5,560.41
Biogen Idec Inc		\$2,905.30	\$3,733.95
Boeing Co		\$6,491.20	\$6,628.98
Cameron Intl Corp		\$29,317.41	\$24,675.30
Caterpillar Inc		\$12,745.08	\$11,349.72
CF Industries Holdings, Inc		\$16,667.28	\$18,532.72
Cintas Corp		\$3,032.01	\$3,294.48
Cisco Systems Inc		\$27,468.06	\$29,901.12
CitiGroup Inc		\$253,847.99	\$82,247.20
Core Mark Holding Co Inc		\$1,796.07	\$2,043.69
Corning Inc		\$5,860.77	\$6,374.54
Delphi Automotive Plc		\$4,692.84	\$5,163.12
Delta Air Lines Inc New		\$7,475.58	\$11,067.75
Directv Com		\$10,532.58	\$14,305.50
Discovery Communications Ser A		\$4,729.51	\$4,685.20
Dow Chemical Company		\$13,311.95	\$12,633.97
Dr Pepper Snapple Group Inc		\$12,869.01	\$15,196.16
Edward Lifesciences Corp		\$6,745.32	\$8,661.84
Eli Lilly & Co		\$1,798.29	\$2,000.71
EOG Resources Inc		\$2,171.17	\$2,025.54
Examworks Group Inc		\$2,099.12	\$2,536.99
FedEx		\$7,812.50	\$8,335.68
Fifth 3rd Bancorp Ohio		\$3,197.33	\$3,280.37
Flowserve Corp		\$3,322.64	\$2,632.52
Frontier Communications		\$1,877.39	\$2,147.74
Gabelli Nat Res		\$100,000.00	\$40,350.00
General Electric Co		\$217,068.54	\$160,009.64
Genl Dynamics Corp		\$12,335.68	\$14,587.72
Gilead Sciences Inc		\$3,189.77	\$4,524.48
GrahamHldgsCo fkaWashingtPostCo		\$9,755.72	\$12,091.91
Greenbrier Cos Inc		\$2,630.74	\$2,202.93
Halliburton Co		\$3,612.96	\$2,045.16
HCA Holdings Inc		\$7,553.04	\$8,146.29
Hess Corp		\$1,965.11	\$1,919.32
Home Depot Inc		\$33,319.91	\$51,855.18
Honeywell Intl Inc		\$3,284.81	\$3,796.96
Huntington Ingalls Industres		\$2,789.25	\$3,261.34
IDT Corp Cl B		\$2,703.23	\$3,371.46

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Ill Tool Works Inc	\$4,835.32	\$4,829 70
Ingersoll Rand Co	\$2,291.25	\$3,549 84
Intel Corp	\$3,930.31	\$4,209 64
Inteliquent Inc Com New	\$2,027.39	\$2,198.56
International Business Machines	\$55,021.05	\$48,452.88
Juniper Networks	\$5,364.13	\$5,557.68
Knight Transportation	\$1,985.44	\$2,019 60
Lockheed Martin Corp	\$8,243.62	\$10,591 35
Lyondellbasell NV Cl A	\$31,278.61	\$26,754.43
Marathon Petroleum Corp	\$35,415.81	\$37,638.42
Mamott Intl Inc New Cl A	\$8,809.39	\$9,519 66
Mastercard Inc CL A	\$4,861 92	\$5,169 60
McGraw Hill Financial Inc Com	\$4,453.21	\$5,338.80
Micron Tech Inc	\$3,959.43	\$4,306.23
Moodys Corp	\$1,810.18	\$1,916 20
MS Contingent Autocall on Anada	\$100,000.00	\$99,150 00
Netapp Inc Com	\$4,486.96	\$5,056 90
New Jersey Res Cp	\$1,975.78	\$2,080.80
Nvidia Corp	\$5,429 50	\$6,776.90
Northrop Grumman	\$8,787.70	\$11,496 42
Olin Corp New	\$3,642.57	\$3,187.80
Outerwall Inc Com New	\$1,998.20	\$2,106.16
Peabody Energy Corp	\$181,933 02	\$77,400.00
Pentair Ltd	\$4,364.33	\$3,985.20
Pfizer Incorporated	\$35,037.33	\$47,690.65
Quest Diagnostics Inc	\$19,170 31	\$22,867.46
Raytheon Co (New)	\$1,978.10	\$2,271.57
Robert Half Int	\$5,172.18	\$5,370 96
Sanderson Farms	\$4,715.23	\$4,369.30
Sandisk Corp	\$1,873 97	\$1,861.62
Seagate Technology Hldgs	\$24,032.60	\$38,304 00
Sherwin Williams Company Ohio	\$2,434.84	\$2,630.40
Skyworks Solutions Inc	\$1,921.74	\$2,617.56
Southwest Airlines	\$7,791.20	\$9,479.68
Strayer Education Inc	\$1,904.71	\$3,342 60
Take Two Interactive Software	\$4,331 26	\$5,045.40
Targa Resources Cp	\$2,511.13	\$2,121.00
Tesoro Petroleum	\$1,991.45	\$1,933.10
The ADT Corp Com	\$4,166.21	\$3,840 38
The Mosaic Co	\$26,627 78	\$27,161.75
TJX Cos Inc New	\$4,813.23	\$5,349.24
Travelers Companies	\$34,664.79	\$49,537 80
Triple-S Mgmt Corp	\$4,863.60	\$5,953.59
Tyson Foods Inc Cl A	\$1,285.92	\$1,603.60
UGI Corp New Com	\$1,941.90	\$2,772.54
Union Pacific Corp	\$9,317 94	\$10,126.05
Vectrus Inc Com	\$1,927.56	\$1,890.60
Vensign Inc	\$24,663.07	\$27,303.00
Viacom Inc Cl B	\$42,024.48	\$37,549 75
Wal-Mart Stores Inc	\$6,071.04	\$7,815.08

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Wells Fargo RL Est In	\$50,000.00	\$50,700.00
Western Digital Corp	\$4,028.24	\$4,981.50
Western Refining, Inc.	\$1,793.18	\$1,775.66
Windstream Hldgs Inc Com	\$5,116.06	\$5,323.04
Wynn Resorts Ltd	\$4,280.16	\$4,314.04
Yahoo Inc	\$2,737.24	\$2,727.54
	<u>\$1,864,101.23</u>	<u>\$1,569,687.04</u>

FORM 990-PF, PART II, LINE 10c	CORPORATE BONDS	Book Value	Fair Market Value
AK Steel Corp		\$97,876.50	\$91,750.00
Bank of America		\$113,991.50	\$107,875.00
Cliffs Natural Resources		\$88,696.50	\$65,000.00
Frontier Communications		\$101,241.50	\$100,000.00
Kinross Gold Corp Reg-S		\$97,618.50	\$93,793.00
Peabody Energy		\$195,588.33	\$173,500.00
Sandridge Energy Inc		\$167,942.00	\$126,000.00
		<u>\$862,954.83</u>	<u>\$757,918.00</u>

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Line 1a: Short-Term Capital Gain

<u>Description of Property</u>	<u>Date Acquired</u>	<u>Date Sold</u>	<u>Sales Price</u>	<u>Cost Basis</u>	<u>Gain (Loss)</u>
Sold 16 shares of Mylan Inc	2/7/13	01/16/2014	\$ 726.78	\$ 460.48	\$ 266.30
Sold 4 shares of Comcast Corp Class A New	2/7/13	01/16/2014	\$ 213.51	\$ 153.88	\$ 59.63
Sold 14 shares of Spectrum Brands Hldgs Inc Com	2/7/13	01/16/2014	\$ 972.21	\$ 759.22	\$ 212.99
Sold 1 share of Delphi Automotive Plc	2/7/13	01/16/2014	\$ 61.98	\$ 38.27	\$ 23.71
Sold 8 shares of McDonalds Corp	2/7/13	01/16/2014	\$ 768.33	\$ 755.68	\$ 12.65
Sold \$200,000 Wachovia Cap Trust II	9/30/13	01/30/2014	\$ 185,070.00	\$ 185,640.00	\$ (570.00)
Sold 19 shares of Robert Half Int	3/8/13, 4/10/13	02/11/2014	\$ 751.04	\$ 692.47	\$ 58.57
Sold \$100,000 Wells Fargo Capital X	9/23/13	02/24/2014	\$ 98,205.00	\$ 97,626.50	\$ 578.50
Sold 45 shares of Apollo Group Inc A	8/8/12	03/11/2014	\$ 1,473.11	\$ 1,272.38	\$ 200.73
Sold 16 shares of LHC Grp	5/13/13	03/11/2014	\$ 357.27	\$ 364.07	\$ (6.80)
Sold \$150,000 Genworth Financial	3/28/13	03/27/2014	\$ 137,310.00	\$ 141,525.00	\$ (4,215.00)
Sold 18 shares of Lowes Companies Inc	5/10/13, 7/16/13	04/15/2014	\$ 839.99	\$ 779.96	\$ 60.03
Sold 6 shares of Motorola Solutions Inc	5/10/13	04/15/2014	\$ 381.35	\$ 338.72	\$ 42.63
Sold 22 shares of Genuine Parts Co	11/12/13	04/15/2014	\$ 1,874.44	\$ 1,792.12	\$ 82.32
Sold 84 shares of LHC Grp	5/13/13, 7/16/13	04/15/2014	\$ 1,800.92	\$ 1,903.30	\$ (102.38)
Sold 72 shares of International Game Tech	5/10/13, 6/3/13	04/15/2014	\$ 985.55	\$ 1,268.59	\$ (283.04)
Sold \$100,000 JPMorgan Chase&Co	12/30/13	04/22/2014	\$ 99,245.50	\$ 98,946.50	\$ 299.00
Sold 13 shares of Alliant Techsystem	2/11/14	05/01/2014	\$ 1,917.12	\$ 1,770.98	\$ 146.14
Sold 4,000 shares of Allstate Corp	2/24/14	05/05/2014	\$ 103,393.50	\$ 100,000.00	\$ 3,393.50
Sold \$100,000 US Steel Corp	3/28/14	05/09/2014	\$ 91,538.50	\$ 88,746.50	\$ 2,792.00
Sold 41 shares of Navient Corp Com	8/9/13	05/15/2014	\$ 649.22	\$ 648.78	\$ 0.44
Sold 41 shares of SLM Corp	8/9/13	05/15/2014	\$ 361.92	\$ 363.35	\$ (1.43)
Sold 26 shares of Alaska Air Group Inc	7/16/13	05/15/2014	\$ 2,469.11	\$ 1,580.52	\$ 888.59
Sold 42 shares of Leidos Hldgs Inc	9/27/13, 10/15/13, 3/11/14	05/15/2014	\$ 1,564.91	\$ 1,793.11	\$ (228.20)
Sold 10 shares of Apollo Group Inc A	7/16/13	05/15/2014	\$ 280.59	\$ 192.87	\$ 87.72
Sold 14 shares of Science Applications Intl Cp	9/27/13	05/15/2014	\$ 521.48	\$ 459.04	\$ 62.44
Sold 4,000 shares of Citigroup Inc	2/5/14	05/29/2014	\$ 102,991.62	\$ 100,000.00	\$ 2,991.62
Sold \$200,000 BAC Capital Trust XIII	12/30/13	06/11/2014	\$ 160,189.50	\$ 154,020.00	\$ 6,169.50
Sold 50 shares of American Express Co	7/16/13, 8/9/13	06/12/2014	\$ 4,754.58	\$ 3,857.82	\$ 896.76
Sold 27 shares of International Game Tech	7/16/13	06/12/2014	\$ 385.52	\$ 495.95	\$ (110.43)
Sold 12 shares of Thermo Fisher Scientific Inc	1/16/14	07/17/2014	\$ 1,445.63	\$ 1,392.66	\$ 52.97
Sold 69 shares of Lions Gate Entertainment Corp	11/12/13, 4/15/14	07/17/2014	\$ 2,150.72	\$ 2,139.02	\$ 11.70
Sold 22 shares of Tyler Technologies Inc	8/9/13	07/17/2014	\$ 1,879.87	\$ 1,659.27	\$ 220.60
Sold 27 shares of Hanesbrands Inc	1/16/14	08/13/2014	\$ 2,622.04	\$ 1,851.66	\$ 770.38

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Sold 14 shares of O'Reilly Automotive Inc New	9/9/13	08/13/2014	\$	2,117.13	\$	1,728.40	\$	388.73
Sold 0.50 shares of UGI Corporation New Com	12/11/13	09/05/2014	\$	17.80	\$	13.25	\$	4.55
Sold 17 shares of LAM Research Corp	10/15/13	09/11/2014	\$	1,229.93	\$	902.48	\$	327.45
Sold 20 shares of Cigna Corp Com	11/12/13	09/11/2014	\$	1,859.60	\$	1,622.40	\$	237.20
Sold 78 shares of Centurylink Inc	11/12/13, 12/11/13	10/16/2014	\$	2,969.95	\$	2,445.56	\$	524.39
Sold 15 shares of Starbucks Corp Washington	11/12/13	10/16/2014	\$	1,078.01	\$	1,208.71	\$	(130.70)
Sold 36 shares of Abbvie Inc Com	11/12/13	10/16/2014	\$	4/27/1905	\$	1,729.78	\$	214.68
Sold 43 shares of PBF Energy Inc	11/12/13, 1/16/14	10/16/2014	\$	978.19	\$	1,199.78	\$	(221.59)
Sold 14 shares of Exelis Inc Com	1/16/14	10/16/2014	\$	217.66	\$	261.98	\$	(44.32)
Sold 54 shares of Iron Mountain Inc (De)	8/13/14	10/16/2014	\$	1,736.12	\$	1,870.56	\$	(134.44)
Sold 0.906 shares of Iron Mountain Inc (De)	11/4/14	11/04/2014	\$	33.17	\$	32.21	\$	0.96
Sold 4,000 shares of Wells Fargo & Co	7/14/14	11/17/2014	\$	100,671.27	\$	100,000.00	\$	671.27
Sold 2,437 shares of Commerce Bancshares Inc	6/13/14	11/17/2014	\$	60,968.21	\$	60,925.00	\$	43.21
Sold 1,419 shares of Commerce Bancshares Inc	6/13/14	11/26/2014	\$	35,752.30	\$	35,475.00	\$	277.30
Sold 144 shares of Commerce Bancshares Inc	6/13/14	11/28/2014	\$	3,567.02	\$	3,600.00	\$	(32.98)
Sold 32 share of Dun & Bradstreet Cp New	2/11/14	12/02/2014	\$	4,002.45	\$	3,091.04	\$	911.41
Sold 130 shares of Coca-Cola Enterprises Inc New	12/11/13	12/02/2014	\$	5,700.87	\$	5,447.61	\$	253.26
Sold 3 shares of St Jude Medical Inc	1/16/14	12/02/2014	\$	203.59	\$	200.16	\$	3.43
Sold 34 shares of Goldman Sachs Grp Inc	12/11/13, 10/16/14	12/02/2014	\$	6,462.28	\$	5,738.37	\$	723.91
Sold 6 shares of Flowserve Corp	12/11/13	12/02/2014	\$	352.82	\$	432.85	\$	(80.03)
Sold 21 shares of Nike Inc B	12/11/13, 7/17/14	12/02/2014	\$	2,052.98	\$	1,619.61	\$	433.37
Sold 9 shares of Ross Stores Inc	1/16/14	12/02/2014	\$	809.71	\$	650.35	\$	159.36
Sold 39 shares of Bristol Myers Squibb Co	2/11/14, 7/17/14	12/02/2014	\$	2,303.37	\$	2,006.00	\$	297.37
Sold 40 shares of Andersons Inc	12/11/13, 1/16/14, 7/17/14	12/02/2014	\$	2,181.51	\$	2,321.38	\$	(139.87)
Sold 28 shares of Borg Warner Inc	6/12/14	12/02/2014	\$	1,594.35	\$	1,826.84	\$	(232.49)
Sold 3 shares of Iron Mountain Inc (De)	11/4/14	12/02/2014	\$	115.93	\$	106.65	\$	9.28
Sold 3,861 shares of Annaly Cap Mgmt Inc	5/30/14	12/17/2014	\$	95,762.71	\$	96,438.61	\$	(675.90)
Sold 139 shares of Annaly Cap Mgmt Inc	5/30/14	12/17/2014	\$	3,454.07	\$	3,471.89	\$	(17.82)
Sold \$100,000 JPM Uncapped CD	3/31/14	12/23/2014	\$	93,282.00	\$	100,000.00	\$	(6,718.00)
Sold \$100,000 JPM Uncapped CD	4/30/14	12/23/2014	\$	92,784.00	\$	100,000.00	\$	(7,216.00)
Total Short-Term Capital Gain			\$	1,536,356.27	\$	1,531,655.14	\$	4,701.13

Line 1b: Long-Term Capital Gain

<u>Description of Property</u>	<u>Date Acquired</u>	<u>Date Sold</u>	<u>Sales Price</u>	<u>Cost Basis</u>	<u>Gain (Loss)</u>
Sold 139 shares of Seagate Technology Plc	11/8/12, 12/6/12, 1/10/13	01/16/2014	\$ 8,446.85	\$ 4,577.79	\$ 3,869.06
Sold 33 shares of Wynn Resorts Ltd	11/8/12, 12/6/12	01/16/2014	\$ 6,922.43	\$ 3,650.18	\$ 3,272.25

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Sold 196 shares of Safeway Inc Com New	11/8/2012	01/16/2014	\$ 6,190.28	\$ 3,195.90	\$ 2,994.38
Sold 129 shares of Gamestop Corp Cl A New	11/8/12, 12/6/12	01/16/2014	\$ 4,898.07	\$ 3,145.92	\$ 1,752.15
Sold 74 shares of Mylan Inc	11/8/2012	01/16/2014	\$ 3,361.35	\$ 1,900.54	\$ 1,460.81
Sold 57 shares of Motorola Solutions Inc	11/8/12, 12/6/12	01/16/2014	\$ 3,746.44	\$ 3,073.01	\$ 673.43
Sold 63 shares of Comcast Corp Class A New	11/8/12, 12/6/12, 1/10/13	01/16/2014	\$ 3,362.75	\$ 2,383.79	\$ 978.96
Sold 16 shares of Visa Inc	10/27/11, 3/7/12	01/16/2014	\$ 3,553.97	\$ 1,578.91	\$ 1,975.06
Sold 37 shares of Spectrum Brands Hldgs Inc Com	1/10/2013	01/16/2014	\$ 2,569.40	\$ 1,767.77	\$ 801.63
Sold 56 shares of Eli Lilly & Co	12/6/12, 1/10/13	01/16/2014	\$ 3,052.50	\$ 2,871.30	\$ 181.20
Sold 31 shares of Travelers Companies Inc Com	10/23/2009	01/16/2014	\$ 2,705.41	\$ 1,590.80	\$ 1,114.61
Sold 83 shares of Haverly Furniture Cos Inc	1/10/2013	01/16/2014	\$ 2,411.76	\$ 1,371.88	\$ 1,039.88
Sold 35 shares of Delphi Automotive Plc	1/10/2013	01/16/2014	\$ 2,169.26	\$ 1,346.38	\$ 822.88
Sold 15 shares of McDonalds Corp	1/10/2013	01/16/2014	\$ 12/10/1903	\$ 1,365.90	\$ 74.72
Sold 42 shares of A O Smith Corp	1/10/2013	01/16/2014	\$ 2,183.64	\$ 1,349.70	\$ 833.94
Sold 50 shares of Newell Rubbermaid Inc	11/8/2012	01/16/2014	\$ 1,605.29	\$ 1,031.89	\$ 573.40
Sold 5 shares of PPG Industries Inc	12/6/2012	01/16/2014	\$ 943.67	\$ 610.45	\$ 333.22
Sold 20 shares of Yahoo Inc	12/6/2012	01/16/2014	\$ 803.98	\$ 381.41	\$ 422.57
Sold 8 shares of Exxon Mobil Corp	10/27/2011	01/16/2014	\$ 789.18	\$ 649.85	\$ 139.33
Sold 108 shares of Motorola Solutions Inc	12/6/12, 1/10/13, 2/7/13	02/10/2014	\$ 7,015.84	\$ 6,015.77	\$ 1,000.07
Sold 173 shares of Safeway Inc Com New	11/8/2012	02/11/2014	\$ 5,509.40	\$ 2,820.87	\$ 2,688.53
Sold 126 shares of Gamestop Corp Cl A New	12/6/12, 1/10/13	02/11/2014	\$ 4,540.18	\$ 3,166.28	\$ 1,373.90
Sold 139 shares of H&R Block Inc	11/8/12, 2/7/13	02/11/2014	\$ 4,184.29	\$ 2,690.10	\$ 1,494.19
Sold 20 shares of PPG Industries Inc	12/6/2012	02/11/2014	\$ 3,681.37	\$ 2,459.87	\$ 1,221.50
Sold 110 shares of Newell Rubbermaid Inc	11/8/12, 12/6/12, 1/10/13	02/11/2014	\$ 3,384.64	\$ 2,350.81	\$ 1,033.83
Sold 63 shares of Robert Half Int	2/7/2013	02/11/2014	\$ 2,490.27	\$ 2,236.28	\$ 253.99
Sold 62 shares of Allstate Corp	11/8/12, 12/6/12	02/11/2014	\$ 3,229.50	\$ 2,479.00	\$ 750.50
Sold 94 shares of Pfizer Inc	10/25/2010	02/11/2014	\$ 2,960.08	\$ 1,656.56	\$ 1,303.52
Sold 127 shares of SLM Corp	1/10/2013, 2/7/13	02/11/2014	\$ 2,953.73	\$ 2,233.94	\$ 719.79
Sold 16 shares of Sherwin Williams Co Ohio	11/8/12, 12/6/12, 2/7/13	02/11/2014	\$ 2,921.71	\$ 2,490.89	\$ 430.82
Sold 48 shares of Eli Lilly & Co	1/10/13, 2/7/13	02/11/2014	\$ 2,604.70	\$ 2,571.56	\$ 33.14
Sold 12 shares of Mohawk Industries Inc	2/7/2013	02/11/2014	\$ 1,739.56	\$ 1,217.49	\$ 522.07
Sold 14 shares of L-3 Communications Holding Inc	11/8/12, 2/7/13	02/11/2014	\$ 1,576.75	\$ 1,073.55	\$ 503.20
Sold 28 shares of A O Smith Corp	2/7/2013	02/11/2014	\$ 1,309.93	\$ 974.13	\$ 335.80
Sold 8 shares of Assurant Inc	12/6/2012	02/11/2014	\$ 510.55	\$ 276.83	\$ 233.72
Sold \$100,000 Wells Fargo Capital X	1/30/2013	02/24/2014	\$ 98,505.00	\$ 105,070.00	\$ (6,565.00)
Sold 348 shares of Safeway Inc Com New	11/8/12, 1/10/13	03/11/2014	\$ 13,511.14	\$ 5,852.55	\$ 7,658.59
Sold 119 shares of Gamestop Corp Cl A New	1/10/13, 2/7/13	03/11/2014	\$ 4,593.24	\$ 2,784.06	\$ 1,809.18

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Sold 101 shares of Leggett & Platt Inc	3/8/2013	03/11/2014	\$ 3,221.47	\$ 3,221.88	\$ (0.41)
Sold 34 shares of American Express Co	2/7/2013	03/11/2014	\$ 3,175.44	\$ 2,114.84	\$ 1,060.60
Sold 57 shares of Allstate Corp	12/6/12, 2/7/13, 3/8/13	03/11/2014	\$ 3,172.47	\$ 2,550.58	\$ 621.89
Sold 43 shares of Motorola Solutions Inc	2/7/2013	03/11/2014	\$ 2,844.04	\$ 2,576.71	\$ 267.33
Sold 69 shares of Owens Illinois Com New	3/8/2013	03/11/2014	\$ 2,270.21	\$ 1,816.35	\$ 453.86
Sold 36 shares of Seagate Technology Plc	2/7/2013	03/11/2014	\$ 1,808.33	\$ 1,242.60	\$ 565.73
Sold 47 shares of Yahoo Inc	12/6/2012	03/11/2014	\$ 1,776.94	\$ 893.61	\$ 883.33
Sold 4 shares of Mohawk Industries Inc	2/7/13, 3/8/13	03/11/2014	\$ 575.70	\$ 427.30	\$ 148.40
Sold 130 shares of Vonage Holdings Corp	9/5/2012	03/12/2014	\$ 577.19	\$ 284.11	\$ 293.08
Distribution of Net Settlement Fund, Colonial Bancorp	2/29/2008	04/08/2014	\$ 803.82	\$ -	\$ 803.82
Sold 164 shares of AT&T Inc	11/8/2012	04/15/2014	\$ 5,810.39	\$ 5,499.13	\$ 311.26
Sold 135 shares of Gamestop Corp C/A New	2/7/13, 3/8/13	04/15/2014	\$ 5,569.19	\$ 3,394.47	\$ 2,174.72
Sold 52 shares of American Express Co	2/7/13, 3/8/13	04/15/2014	\$ 4,500.36	\$ 3,275.51	\$ 1,224.85
Sold 76 shares of Lowes Companies Inc	4/10/2013	04/15/2014	\$ 3,546.63	\$ 2,950.34	\$ 596.29
Sold 36 shares of Dun & Bradstreet Cp New	3/8/2013	04/15/2014	\$ 3,610.27	\$ 2,898.33	\$ 711.94
Sold 119 shares of Newell Rubbermaid Inc	1/10/13, 2/7/13, 4/10/13	04/15/2014	\$ 3,473.26	\$ 2,768.33	\$ 704.93
Sold 58 shares of Allstate Corp	3/8/13, 4/10/13	04/15/2014	\$ 3,224.87	\$ 2,842.94	\$ 381.93
Sold 39 shares of Motorola Solutions Inc	2/7/13, 3/8/13, 4/10/13	04/15/2014	\$ 2,478.74	\$ 2,455.98	\$ 22.76
Sold 84 shares of Huntsman Corp	4/10/2013	04/15/2014	\$ 2,040.04	\$ 1,524.51	\$ 515.53
Sold 56 shares of Yahoo Inc	12/6/12, 1/10/13, 2/7/13	04/15/2014	\$ 1,901.11	\$ 1,073.81	\$ 827.30
Sold 27 shares of Seagate Technology Plc	2/7/2013	04/15/2014	\$ 1,478.22	\$ 931.95	\$ 546.27
Sold 12 shares of Exxon Mobil Corp	10/27/2011	04/15/2014	\$ 1,176.04	\$ 974.78	\$ 201.26
Sold 34 shares of Apollo Group Inc A	8/8/2012	04/15/2014	\$ 931.10	\$ 961.35	\$ (30.25)
Sold 6 shares of Mohawk Industries Inc	4/10/2013	04/15/2014	\$ 814.27	\$ 681.16	\$ 133.11
Sold 139 shares of Vonage Holdings Corp	9/5/2012	04/15/2014	\$ 526.93	\$ 302.92	\$ 224.01
Sold 108 shares of American Express Co	3/8/13, 4/10/13, 5/10/13	05/15/2014	\$ 9,423.46	\$ 7,154.86	\$ 2,268.60
Sold 49 shares of Dun & Bradstreet Cp New	3/8/13, 4/10/13	05/15/2014	\$ 5,088.35	\$ 4,125.44	\$ 962.91
Sold 104 shares of Gamestop Corp C/A New	3/8/2013	05/15/2014	\$ 3,661.97	\$ 2,548.12	\$ 1,113.85
Sold 332 shares of Navient Corp Com	2/7/13, 5/10/13	05/15/2014	\$ 5,257.10	\$ 4,125.09	\$ 1,132.01
Sold 332 shares of SLM Corp	2/7/13, 5/10/13	05/15/2014	\$ 2,930.66	\$ 2,310.31	\$ 620.35
Sold 109 shares of Newell Rubbermaid Inc	4/10/13, 5/10/13	05/15/2014	\$ 3,163.71	\$ 2,838.39	\$ 325.32
Sold 72 shares of Yahoo Inc	2/7/13, 3/8/13, 4/10/13	05/15/2014	\$ 2,406.04	\$ 1,596.53	\$ 809.51
Sold 17 shares of Amerisourcebergen Corp	3/8/2013	05/15/2014	\$ 1,138.54	\$ 821.44	\$ 317.10
Sold 22 shares of Apollo Group Inc A	8/8/12, 12/6/12, 5/10/13	05/15/2014	\$ 617.30	\$ 441.24	\$ 176.06
Sold 7 shares of Exxon Mobil Corp	10/27/2011	05/15/2014	\$ 704.59	\$ 568.62	\$ 135.97
Sold 55 shares of Barrett Business Services Inc	4/15/2013	05/19/2014	\$ 2,427.93	\$ 2,998.30	\$ (570.37)

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Sold 9 shares of Domtar Corp New	10/27/2011	05/19/2014	\$ 816.15	\$ 723.30	\$ 92.85
Sold \$100,000 Centurytel Inc	2/27/2013	06/12/2014	\$ 101,235.50	\$ 100,469.00	\$ 766.50
Sold 52 shares of American Express Co	5/10/13,6/3/13	06/12/2014	\$ 4,944.77	\$ 3,834.44	\$ 1,110.33
Sold 87 shares of Flowserve Corp	5/10/13,6/3/13	06/12/2014	\$ 6,707.52	\$ 4,713.69	\$ 1,993.83
Sold 403 shares of International Game Tech	4/10/13,6/3/13	06/12/2014	\$ 5,754.18	\$ 6,825.90	\$ (1,071.72)
Sold 36 shares of Thermo Fisher Scientific	3/8/13,4/10/13	06/12/2014	\$ 4,309.35	\$ 2,792.13	\$ 1,517.22
Sold 20 shares of PPG Industries Inc	1/10/13,2/7/13	06/12/2014	\$ 4,094.30	\$ 2,759.80	\$ 1,334.50
Sold 37 shares of Dun & Bradstreet Cp New	4/10/13,5/10/13	06/12/2014	\$ 3,814.98	\$ 3,375.72	\$ 439.26
Sold 37 shares of Exxon Mobil Corp	10/27/2011	06/12/2014	\$ 3,797.87	\$ 3,005.56	\$ 792.31
Sold 48 shares of Amerisourcebergen Corp	3/8/13,4/10/13,5/10/13	06/12/2014	\$ 3,431.96	\$ 2,500.75	\$ 931.21
Sold 26 shares of Domtar Corp New	10/27/11,9/5/12,12/6/12	06/12/2014	\$ 2,274.39	\$ 2,039.86	\$ 234.53
Sold 59 shares of Yahoo Inc	4/10/2013	06/12/2014	\$ 2,157.52	\$ 1,428.70	\$ 728.82
Sold 54 shares of Twenty-First Century Fox	5/10/2013	06/12/2014	\$ 1,930.77	\$ 1,593.81	\$ 336.96
Sold 162 shares of Vonage Holdings Corp	9/5/2012	06/12/2014	\$ 558.36	\$ 353.05	\$ 205.31
Sold 162 shares of Gamestop Corp Cl A New	3/8/13,4/10/13	07/17/2014	\$ 6,772.05	\$ 4,557.76	\$ 2,214.29
Sold 75 shares of Directv Com	3/8/13,6/3/13,7/16/13	07/17/2014	\$ 6,501.83	\$ 4,293.63	\$ 2,208.20
Sold 51 shares of Dun & Bradstreet Cp New	5/10/13,6/3/13,7/16/13	07/17/2014	\$ 5,647.38	\$ 4,955.98	\$ 691.40
Sold 54 shares of Exxon Mobil Corp	10/27/2011	07/17/2014	\$ 5,598.24	\$ 4,386.50	\$ 1,211.74
Sold 89 shares of Kroger Co	3/8/13,4/10/13	07/17/2014	\$ 4,391.71	\$ 2,766.94	\$ 1,624.77
Sold 23 shares of Thermo Fisher Scientific Inc	4/10/13,7/16/13	07/17/2014	\$ 2,770.80	\$ 1,906.93	\$ 863.87
Sold 12 shares of Biogen Idec Inc	7/16/2013	07/17/2014	\$ 3,685.72	\$ 2,654.90	\$ 1,030.82
Sold 30 shares of Gilead Science	7/16/2013	07/17/2014	\$ 2,637.98	\$ 1,714.25	\$ 923.73
Sold 44 shares of MetLife Inc	7/16/2013	07/17/2014	\$ 2,471.44	\$ 2,122.56	\$ 348.88
Sold 31 shares of Seagate Technology Plc	2/7/2013	07/17/2014	\$ 1,890.79	\$ 1,070.01	\$ 820.78
Sold 53 shares of Pfizer Inc	10/25/2010	07/17/2014	\$ 1,652.24	\$ 934.02	\$ 718.22
Sold 44 shares of AT&T Inc	11/8/2012	07/17/2014	\$ 1,603.50	\$ 1,475.38	\$ 128.12
Sold 73 shares of Aeon Inc	7/16/2013	07/17/2014	\$ 1,518.59	\$ 1,233.72	\$ 284.87
Sold 26 shares of Twenty-First Century Fox Cl A	5/10/13,7/16/13	07/17/2014	\$ 859.97	\$ 775.89	\$ 84.08
Sold 10 shares of Amerisourcebergen Corp	7/16/2013	07/17/2014	\$ 732.68	\$ 584.53	\$ 148.15
Sold 9 shares of St Jude Medical Inc	7/16/2013	07/17/2014	\$ 611.75	\$ 440.37	\$ 171.38
Sold 139 shares of Vonage Holdings Corp	9/5/2012	07/17/2014	\$ 488.47	\$ 302.92	\$ 185.55
Sold 7 shares of Assurant Inc	12/6/2012	07/17/2014	\$ 459.89	\$ 242.23	\$ 217.66
Sold 16 shares of Exelis Inc Com	7/16/2013	07/17/2014	\$ 273.72	\$ 229.63	\$ 44.09
Sold 3 shares of Flowserve Corp	6/3/2013	07/17/2014	\$ 217.43	\$ 165.03	\$ 52.40
Sold 66 shares of Exxon Mobil Corp	10/27/11,6/5/12	08/13/2014	\$ 6,517.28	\$ 5,469.77	\$ 1,047.51
Sold 68 shares of Directv Com	7/16/2013	08/13/2014	\$ 5,715.97	\$ 4,424.61	\$ 1,291.36

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Sold 49 share of Dun & Bradstreet Cp New	7/16/2013	08/13/2014	\$ 5,594.33	\$ 5,201.40	\$ 392.93
Sold 80 shares of Seagate Technology Plc	2/7/13,8/13	08/13/2014	\$ 4,587.96	\$ 2,627.53	\$ 1,960.43
Sold 81 shares of Kroger Co	4/10/13,5/10/13,7/16/13	08/13/2014	\$ 4,044.47	\$ 3,012.77	\$ 1,031.70
Sold 38 shares of Honeywell Intl Inc	4/10/2013	08/13/2014	\$ 3,551.08	\$ 2,824.64	\$ 726.44
Sold 85 shares of Twenty-First Century Fox Cl A	7/16/2013	08/13/2014	\$ 2,990.37	\$ 2,564.42	\$ 425.95
Sold 31 shares of LAM Research Corp	8/9/2013	08/13/2014	\$ 2,140.27	\$ 1,480.20	\$ 660.07
Sold 23 shares of Home Depot Inc	10/25/2010	08/13/2014	\$ 1,908.91	\$ 724.48	\$ 1,184.43
Sold 97 shares of Western UN Co	8/9/2013	08/13/2014	\$ 1,676.53	\$ 1,793.29	\$ (116.76)
Sold 32 shares of PBF Energy Inc	7/16/2013	08/13/2014	\$ 803.18	\$ 713.49	\$ 89.69
Sold 42 shares of Aeon Inc	7/16/2013	08/13/2014	\$ 779.74	\$ 709.81	\$ 69.93
Sold 6 shares of Boeing Co	7/16/2013	08/13/2014	\$ 726.52	\$ 625.36	\$ 101.16
Sold 5,100 shares of United Sts Stl Cp (New)	7/1/11,7/31/12	08/19/2014	\$ 192,386.73	\$ 170,755.83	\$ 21,630.90
Sold 138 shares of LAM Research Corp	8/9/13,9/9/13	09/11/2014	\$ 9,984.13	\$ 6,749.87	\$ 3,234.26
Sold 91 shares of Exxon Mobil Corp	9/5/12,11/8/12	09/11/2014	\$ 8,778.78	\$ 7,972.57	\$ 806.21
Sold 114 shares of Seagate Technology Plc	3/8/2013	09/11/2014	\$ 6,893.75	\$ 3,680.67	\$ 3,213.08
Sold 59 shares of Directv Com	7/16/13,8/9/13	09/11/2014	\$ 5,132.36	\$ 3,763.99	\$ 1,368.37
Sold 38 shares of Dun & Bradstreet Cp New	7/16/13,8/9/13	09/11/2014	\$ 4,452.85	\$ 4,051.20	\$ 401.65
Sold 80 shares of Kroger Co	7/16/13,9/9/13	09/11/2014	\$ 4,141.08	\$ 3,021.52	\$ 1,119.56
Sold 24 shares of Cigna Corp Com	9/9/2013	09/11/2014	\$ 2,231.52	\$ 1,943.49	\$ 288.03
Sold 52 shares of Amerisourcebergen Corp	7/16/13,9/9/13	09/11/2014	\$ 4,004.41	\$ 3,037.63	\$ 966.78
Sold 105 shares of Twenty-First Century Fox Cl A	7/16/13,8/9/13	09/11/2014	\$ 3,713.91	\$ 3,296.43	\$ 417.48
Sold 46 shares of Starbucks Corp Washington	9/9/2013	09/11/2014	\$ 3,522.61	\$ 3,319.81	\$ 202.80
Sold 203 shares of Western Un Co	8/9/13,9/9/13	09/11/2014	\$ 3,444.81	\$ 3,747.83	\$ (303.02)
Sold 21 shares of Ameriprise Fincl Inc	6/3/2013	09/11/2014	\$ 2,625.91	\$ 1,694.88	\$ 931.03
Sold 43 shares of Magellan Health Services Inc	10/27/2011	09/11/2014	\$ 2,348.67	\$ 2,278.33	\$ 70.34
Sold 94 shares of Live Nation Entertainment Inc	9/9/2013	09/11/2014	\$ 2,221.78	\$ 1,615.31	\$ 606.47
Sold 21 shares of Home Depot Inc	10/25/2010	09/11/2014	\$ 1,870.24	\$ 661.49	\$ 1,208.75
Sold 59 shares of Manhattan Assoc Inc	2/11/14,7/17/14	09/11/2014	\$ 1,758.75	\$ 1,938.75	\$ (180.00)
Sold 61 shares of General Electric Co	12/7/2004	09/11/2014	\$ 1,587.92	\$ 2,185.63	\$ (597.71)
Sold 45 shares of Exelis Inc Com	7/16/2013	09/11/2014	\$ 816.85	\$ 645.84	\$ 171.01
Sold 0 445 shares of Vectrus Inc Com	7/16/2013	09/26/2014	\$ 9.59	\$ 7.67	\$ 1.92
Sold \$100,000 CFI Jump Gold	9/28/2012	09/29/2014	\$ 68,538.85	\$ 100,000.00	\$ (31,461.15)
Sold \$100,000 Centurytel Inc	2/27/2013	09/30/2014	\$ 97,532.21	\$ 100,469.00	\$ (2,936.79)
SEC Dell Inc Fair Fund Settlement	8/31/2005	10/15/2014	\$ 38.20	\$ -	\$ 38.20
Sold 100 shares of Exxon Mobil Corp	11/8/12,12/6/12,1/10/13,2/7/13	10/16/2014	\$ 9,008.71	\$ 8,780.53	\$ 228.18
Sold 350 shares of General Electric Co	12/7/2004	10/16/2014	\$ 8,502.19	\$ 12,540.50	\$ (4,038.31)

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Sold 217 shares of Yahoo Inc	4/10/13, 5/10/13, 7/16/13, 10/15/13	10/16/2014	\$	8,250.30	\$	6,402.20	\$	1,848.10
Sold 81 shares of Centurylink Inc	10/15/2013	10/16/2014	\$	3,084.18	\$	2,645.57	\$	438.61
Sold 41 shares of Dun & Bradstreet Cp New	8/9/13, 9/9/13	10/16/2014	\$	4,570.16	\$	5,238.77	\$	(668.61)
Sold 37 shares of Ameriprise Fincl Inc	6/3/13, 7/16/13, 8/9/13, 9/9/13	10/16/2014	\$	4,007.91	\$	3,211.87	\$	796.04
Sold 30 shares of Boeing Co	7/16/13, 8/9/13, 10/15/13	10/16/2014	\$	3,589.94	\$	3,181.17	\$	408.77
Sold 37 shares of Travelers Companies Inc Com	10/23/2009	10/16/2014	\$	3,390.64	\$	1,898.69	\$	1,491.95
Sold 216 shares of Western Un Co	9/9/13, 10/15/13	10/16/2014	\$	3,386.48	\$	3,968.76	\$	(582.28)
Sold 37 shares of Home Depot Inc	10/25/10, 2/6/12	10/16/2014	\$	3,275.10	\$	1,510.98	\$	1,764.12
Sold 97 shares of Twenty-First Century Fox Cl A	8/9/13, 9/9/13, 10/15/13	10/16/2014	\$	3,126.44	\$	3,153.86	\$	(27.42)
Sold 26 shares of Starbucks Corp Washington	9/9/13, 10/15/13	10/16/2014	\$	1,868.54	\$	1,994.92	\$	(126.38)
Sold 84 shares of AT&T Inc	11/8/2012	10/16/2014	\$	9/12/1907	\$	2,816.63	\$	(3.83)
Sold 11 shares of McKesson Corp	8/8/2012	10/16/2014	\$	2,028.72	\$	2,701.93	\$	(673.21)
Sold 96 shares of Goodyear Tire & Rubber	10/15/2013	10/16/2014	\$	1,933.03	\$	2,166.83	\$	(233.80)
Sold 40 shares of PBF Energy Inc	7/16/2013	10/16/2014	\$	909.94	\$	891.87	\$	18.07
Sold 102 shares of Exelis Inc Com	7/16/13, 10/15/13	10/16/2014	\$	1,585.81	\$	1,423.23	\$	162.58
Sold \$200,000 Zions Bancorp	5/31/13, 6/25/13	10/16/2014	\$	189,541.50	\$	200,945.50	\$	(11,404.00)
Sold 343 shares of Vonage Holdings Corp	9/5/12, 12/6/12, 2/7/13	10/17/2014	\$	1,127.62	\$	833.09	\$	294.53
Sold 39 shares of Aeon Inc	7/16/13, 10/15/13	10/20/2014	\$	699.58	\$	670.81	\$	28.77
Sold 95 shares of Dun & Bradstreet Cp New	9/9/13, 10/15/13, 11/12/13	12/02/2014	\$	11,882.29	\$	9,195.93	\$	2,686.36
Sold 115 shares of Coca-Cola Enterprises Inc New	11/12/2013	12/02/2014	\$	5,043.07	\$	4,769.15	\$	273.92
Sold 154 shares of St Jude Medical Inc	7/16/13, 11/12/13	12/02/2014	\$	10,450.72	\$	8,026.49	\$	2,424.23
Sold 99 shares of Exxon Mobil Corp	Various 2/7/13-11/12/13	12/02/2014	\$	9,220.31	\$	8,894.55	\$	325.76
Sold 494 shares of Western UN Co	10/15/13, 11/12/13	12/02/2014	\$	9,032.54	\$	8,808.91	\$	223.63
Sold 11 shares of Goldman Sachs Grp Inc	11/12/2013	12/02/2014	\$	2,090.74	\$	1,796.52	\$	294.22
Sold 63 shares of Ameriprise Fincl Inc	9/9/13, 10/15/13, 11/12/13	12/02/2014	\$	8,329.47	\$	6,073.22	\$	2,256.25
Sold 99 shares of Flowserve Corp	6/3/13, 6/21/13, 10/15/13	12/02/2014	\$	5,821.58	\$	5,927.56	\$	(105.98)
Sold 70 shares of Mastercard Inc Cl A	10/15/13, 11/12/13	12/02/2014	\$	6,083.05	\$	4,960.47	\$	1,122.58
Sold 69 shares of Directv Com	8/9/13, 9/9/13	12/02/2014	\$	6,035.95	\$	4,264.55	\$	1,771.40
Sold 32 shares of Nike Inc B	11/12/2013	12/02/2014	\$	3,128.34	\$	2,458.97	\$	669.37
Sold 82 shares of Kroger Co	9/9/13, 11/12/13	12/02/2014	\$	4,882.02	\$	3,344.79	\$	1,537.23
Sold 50 shares of Marathon Petroleum Corp	6/7/12, 9/5/12, 12/6/12	12/02/2014	\$	4,687.36	\$	2,745.84	\$	1,941.52
Sold 97 shares of Twenty-First Century Fox Cl A	10/15/13, 11/12/13	12/02/2014	\$	3,606.20	\$	3,233.36	\$	372.84
Sold 71 shares of Delta Air Lines Inc New	10/15/2013	12/02/2014	\$	3,218.25	\$	1,704.04	\$	1,514.21
Sold 22 shares of Ross Stores Inc	11/12/2013	12/02/2014	\$	1,979.28	\$	1,729.23	\$	250.05
Sold 92 shares of Sonic Corp	11/12/2013	12/02/2014	\$	2,540.19	\$	1,759.45	\$	780.74
Sold 62 shares of Tyson Foods Inc Cl A	10/15/13, 11/12/13	12/02/2014	\$	2,530.53	\$	1,809.27	\$	721.26

SOKA'PIIWA FOUNDATION
Form 990-PF Part IV Detail
Statement 8

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Sold 60 shares of UGI Corp New Com	11/12/2013	12/02/2014	\$	2,258.82	\$	1,627.50	\$	631.32
Sold 596 shares of Vonage Holdings Corp	2/7/13, 4/10/13	12/02/2014	\$	1,994.29	\$	1,692.27	\$	302.02
Sold 14 shares of Northrop Grumman Cp(Hldg Co)	11/12/2013	12/02/2014	\$	1,965.43	\$	1,537.16	\$	428.27
Sold 71 shares of Aeon Inc	10/15/13, 11/12/13	12/02/2014	\$	1,465.72	\$	1,255.68	\$	210.04
Sold 13 shares of Travelers Companies Inc Com	10/23/09, 10/25/10, 10/27/11	12/02/2014	\$	1,356.69	\$	727.28	\$	629.41
Sold 10 shares of Home Depot Inc	2/6/2012	12/02/2014	\$	981.29	\$	452.07	\$	529.22
Sold 13 shares of Assurant Inc	12/6/2012	12/02/2014	\$	881.31	\$	449.85	\$	431.46
Sold 8 shares of Seagate Technology Plc	3/8/13, 4/10/13	12/02/2014	\$	537.58	\$	274.75	\$	262.83
Sold 14 shares of General Electric Co	12/7/2004	12/02/2014	\$	365.65	\$	501.62	\$	(135.97)
Sold 1 share of Biogen Idec Inc	7/16/2013	12/02/2014	\$	329.10	\$	221.24	\$	107.86
Sold 2 shares of Honeywell Intl Inc	4/10/2013	12/02/2014	\$	194.55	\$	148.67	\$	45.88
Sold 1,000 shares of Citigroup Inc New	2/17/09, 6/12/09	12/04/2014	\$	54,457.32	\$	167,005.26	\$	(112,547.94)
AIG Securities Litigation Settlement	3/1/2004	12/08/2014	\$	500.66	\$	-	\$	500.66
Total Long-Term Capital Gain			\$	1,416,741.62	\$	1,422,067.50	\$	(5,325.88)

Soka'piliwa Foundation
Form 990-PF Part XV Detail
Statement 9

83-0321664

Recipient	Address	Relationship to Soka'piliwa	Purpose	Amount
Alliance for the Wild Rockies	PO Box 505, Helena, MT 59624	None	Habitat Preservation	10,000.00
Bright Eyes Care & Rehab Center Inc	PO Box 1498, Choteau, MT 59422	None	Animal Care & Protection	1,000.00
Glacier National Park Conservancy	PO Box 2749, Columbia Falls, MT 59912	None	Preservation, Education & Research	2,500.00
Montana Environmental Information Center	PO Box 1184, Helena, MT 59624	None	Protection & Restoration	28,000.00
Montana Land Reliance	PO Box 355, Helena, MT 59624	None	Protection of Private Lands	5,000.00
Montana Public Radio	32 Campus Dr , Missoula, MT 59812	None	Communication to the Public	9,000.00
Montana Trout Unlimited	PO Box 7186, Missoula, MT 59807	None	Conservation & Protection	20,000.00
Montana Wilderness Association	80 South Warrant St., Helena, MT 59601	None	Protection of Montana Wilderness	20,000.00
Neighbors Helping Neighbors	PO Box 303, Choteau, MT 59422	None	Help for Low Income	18,000.00
Northern Plains Resource Council	432 N Last Chance Gulch, Suite H, Helena, MT 59601	None	Conservation	10,000.00
National Resource Defense Council	317 E. Mendenhall St., Suite D&E, Bozeman, MT 59715	None	Safeguard the Earth	15,000.00
Old Trail Museum	823 North Main, Choteau, MT 59422	None	Preservation & Education	22,500.00
Ranch Hope	PO Box 325, Alloway, NJ 08001	None	Christ-Centered Environment	4,500.00
Reining Horse Sports Foundation	3000 NW 10th St , Oklahoma City, OK 73107	None	Development & Education	1,500.00
Rocky Mountain Elk Foundation	PO Box 8249, Missoula, MT 59807	None	Elk Protection & Preservation	20,000.00
Rocky Mountain Front Weed Roundtable	PO Box 663, Choteau, MT 59422	None	Weed Management	3,000.00
Southeastern Reining Horse Association	2150 Woodmoor Dr , Greenville, NC 27858	None	Promotion of the Reining Horse	3,000.00
Teton Medical Center	915 Fourth St NW, Choteau, MT 59422	None	Medical Care	15,000.00
The Nature Conservancy of Montana	32 S. Ewing, Suite 215, Helena, MT 59601	None	Conserve Lands & Waters	5,000.00
Western Rivers Conservancy	71 SW Oak St., Suite 100, Portland, RE 97204	None	Protection of River Ecosystems	<u>20,000.00</u>
				233,000.00

Application for Extension of Time To File an Exempt Organization Return

OMB No 1545-1709

► File a separate application for each return.

► Information about Form 8868 and its instructions is at www.irs.gov/form8868.

- 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	Name of exempt organization or other filer, see instructions	Enter filer's identifying number
	SOKA 'PIIWA FOUNDATION	Employer identification number (EIN) or 83-0321664
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. 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)

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 (other than individual)	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

KAREN KOYAMA-BREEN

- The books are in the care of ► 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, 2015, to file the exempt organization return for the organization named above. The extension is for the organization's return for:
► ☒ calendar year 2014 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 Forms 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	564.
b If this application is for Forms 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	\$	5,217.
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 funds withdrawal (direct debit) with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.