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EXTENDED TO NOVEMBER 15, 2018

Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation

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

▶ Do not enter social security numbers on this form as it may be made public.

▶ Go to www.irs.gov/Form990PF for instructions and the latest information.

OMB No 1545-0052

2017

Open to Public Inspection

For calendar year 2017 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) | Room/suite

P.O. BOX 6769

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 | 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: [X] 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) ▶$ 2,133,262.

J Accounting method: [X] 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 ▶ [X] if the foundation is not required to attach Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	56,864.	56,864.		STATEMENT 1
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain or (loss) from sale of assets not on line 10	153,930.			
	b Gross sales price for all assets on line 6a 1,305,677.				
	7 Capital gain net income (from Part IV, line 2)		153,930.		
	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	344.	344.	0.	STATEMENT 2
	12 **Total.** Add lines 1 through 11	211,138.	211,138.	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 3	6,929.	3,465.	0.	3,465.
	c Other professional fees				
	17 Interest				
	18 Taxes				
	19 Depreciation and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses STMT 4	23,076.	23,076.	0.	0.
	24 **Total operating and administrative expenses.** Add lines 13 through 23	30,005.	26,541.	0.	3,465.
	25 Contributions, gifts, grants paid	74,000.			74,000.
	26 **Total expenses and disbursements.** Add lines 24 and 25	104,005.	26,541.	0.	77,465.
	27 Subtract line 26 from line 12:				
	a Excess of revenue over expenses and disbursements	107,133.			
	b **Net investment income** (if negative, enter -0-)		184,597.		
	c **Adjusted net income** (if negative, enter -0-)			0.	

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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	172,279.	269,541.	269,541.
	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 6	1,601,257.	2,044,919.	1,665,296.
	c Investments - corporate bonds STMT 7	625,564.	190,846.	198,425.
	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)	2,399,100.	2,505,306.	2,133,262.
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 ▶ [X] and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	2,399,100.	2,505,306.	
	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**	2,399,100.	2,505,306.	
	31 **Total liabilities and net assets/fund balances**	2,399,100.	2,505,306.	

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	2,399,100.
2	Enter amount from Part I, line 27a	2	107,133.
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	2,506,233.
5	Decreases not included in line 2 (itemize) ▶ SEE STATEMENT 5	5	927.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	2,505,306.

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Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (for example, 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	267,962.		282,102.	-14,140.
b	1,037,715.		869,645.	168,070.
c				
d				
e				

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

	(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				-14,140.
b				168,070.
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	153,930.
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 [X] No

If "Yes," the foundation doesn't 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))
2016	123,466.	1,903,228.	.064872
2015	95,987.	2,206,071.	.043510
2014	234,753.	2,578,091.	.091057
2013	32,430.	2,446,899.	.013254
2012	113,122.	2,231,888.	.050684

2	**Total** of line 1, column (d)	2	.263377
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5.0, or by the number of years the foundation has been in existence if less than 5 years	3	.052675
4	Enter the net value of noncharitable-use assets for 2017 from Part X, line 5	4	2,113,132.
5	Multiply line 4 by line 3	5	111,309.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,846.
7	Add lines 5 and 6	7	113,155.
8	Enter qualifying distributions from Part XII, line 4	8	77,465.

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			1	3,692.
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	3,692.
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	3,692.
6	Credits/Payments:				
a	2017 estimated tax payments and 2016 overpayment credited to 2017	6a	3,356.		
b	Exempt foreign organizations - tax withheld at source	6b	0.		
c	Tax paid with application for extension of time to file (Form 8868)	6c	500.		
d	Backup withholding erroneously withheld	6d	0.		
7	Total credits and payments. Add lines 6a through 6d			7	3,856.
8	Enter any **penalty** for underpayment of estimated tax. Check here if Form 2220 is attached			8	0.
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	164.
11	Enter the amount of line 10 to be: **Credited to 2018 estimated tax** ▶ 164. **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 the instructions for the definition	1b		X
	If the answer is "Yes" to **1a** or **1b**, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation. ▶ $ 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 2017 or the tax year beginning in 2017? See the 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

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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 2017, 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 FinCEN Form 114. 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 2017?	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 2017, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2017? ☐ 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 2017 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 2017.) 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 2017?	4b		X

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

		Yes	No
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 [X] 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 [X] No		
(3) Provide a grant to an individual for travel, study, or other similar purposes?	Yes [X] No		
(4) Provide a grant to an organization other than a charitable, etc., organization described in section 4945(d)(4)(A)? See instructions	[ ] Yes [X] 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 [X] 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 [X] No		
b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?	**6b**		X
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 [X] 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, and 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.
PATRICIA K. 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

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	1,903,550.
b	Average of monthly cash balances	1b	241,762.
c	Fair market value of all other assets	1c	
d	**Total** (add lines 1a, b, and c)	1d	2,145,312.
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	2,145,312.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	32,180.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4	5	2,113,132.
6	**Minimum investment return.** Enter 5% of line 5	6	105,657.

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	105,657.
2a	Tax on investment income for 2017 from Part VI, line 5 — 2a: 3,692.		
b	Income tax for 2017. (This does not include the tax from Part VI.) — 2b:		
c	Add lines 2a and 2b	2c	3,692.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	101,965.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	101,965.
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	101,965.

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	77,465.
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	77,465.
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	0.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	77,465.

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 2016	(c) 2016	(d) 2017
1 Distributable amount for 2017 from Part XI, line 7				101,965.
2 Undistributed income, if any, as of the end of 2017				
a Enter amount for 2016 only			0.	
b Total for prior years: ____ , ____ , ____		0.		
3 Excess distributions carryover, if any, to 2017:				
a From 2012				
b From 2013				
c From 2014				
d From 2015				
e From 2016 6,424.				
f Total of lines 3a through e	6,424.			
4 Qualifying distributions for 2017 from Part XII, line 4: ▶ $ 77,465.				
a Applied to 2016, but not more than line 2a			0.	
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 2017 distributable amount				77,465.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2017 (If an amount appears in column (d), the same amount must be shown in column (a).)	6,424.			6,424.
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 2016. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2017. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2018				18,076.
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 2012 not applied on line 5 or line 7	0.			
9 **Excess distributions carryover to 2018.** Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9:				
a Excess from 2013				
b Excess from 2014				
c Excess from 2015				
d Excess from 2016				
e Excess from 2017				

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 2017, 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) 2017	(b) 2016	(c) 2015	(d) 2014	(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 ▶ [X] 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., to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number or email address 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 10				74,000.
Total			▶ 3a	74,000.
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 (a) Business code	Unrelated business income (b) Amount	Excluded by section 512, 513, or 514 (c) Exclusion code	Excluded by section 512, 513, or 514 (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	56,864.	
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					344.
8 Gain or (loss) from sales of assets other than inventory			18	153,930.	
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.		210,794.	344.

13 Total. Add line 12, columns (b), (d), and (e) 13 211,138.

(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) (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) (other than section 501(c)(3)) or in section 527? Yes [X] 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

May the IRS discuss this return with the preparer shown below? See instr [X] Yes No

George D Widener II — 11/15/18 — TRUSTEE

Signature of officer or trustee — Date — Title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check if self-employed	PTIN
PJ KOVACH		11/13/2018		P00954161

Firm's name ▶ DELOITTE TAX LLP — Firm's EIN ▶ 86-1065772

Firm's address ▶ 1601 WEWATTA STREET, SUITE 400 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	56,864.	0.	56,864.	56,864.	56,864.
TO PART I, LINE 4	56,864.	0.	56,864.	56,864.	56,864.

FORM 990-PF OTHER INCOME STATEMENT 2

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
APOLLO GLOBAL MANAGEMENT,LLC	344.	344.	0.
TOTAL TO FORM 990-PF, PART I, LINE 11	344.	344.	0.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	6,929.	3,465.	0.	3,465.
TO FORM 990-PF, PG 1, LN 16B	6,929.	3,465.	0.	3,465.

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	22,994.	22,994.	0.	0.
POSTAGE AND DELIVERY CHARGES	82.	82.	0.	0.
TO FORM 990-PF, PG 1, LN 23	23,076.	23,076.	0.	0.

FORM 990-PF	OTHER DECREASES IN NET ASSETS OR FUND BALANCES	STATEMENT 5

DESCRIPTION	AMOUNT
DIFFERENCE BETWEEN FMV AND COST BASIS FOR CAPITAL GAINS	927.
TOTAL TO FORM 990-PF, PART III, LINE 5	927.

FORM 990-PF	CORPORATE STOCK	STATEMENT 6

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT 8	2,044,919.	1,665,296.
TOTAL TO FORM 990-PF, PART II, LINE 10B	2,044,919.	1,665,296.

FORM 990-PF	CORPORATE BONDS	STATEMENT 7

DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE
SEE STATEMENT 8	190,846.	198,425.
TOTAL TO FORM 990-PF, PART II, LINE 10C	190,846.	198,425.

SOKA'PIIWA FOUNDATION **83-0321664**
December 31, 2017
Statement 8

FORM 990-PF, PART II, LINE 10b	CORPORATE STOCK	Book Value	Fair Market Value
Activision Blizzard Inc		$8,274.78	$8,421.56
Adobe Systems		$6,607 17	$8,236 28
Advanced Energy Ind Inc		$3,964 70	$4,183 76
Agilent Technologies		$10,996 65	$10,916.11
Allergan Plc Shs		$7,978 71	$6,379 62
Altisource Portfolio Solutions		$2,716.46	$3,612 00
American Express Co		$23,071 46	$33,765 40
Ameriprise Fincl Inc		$19,683 61	$21,014.28
Analog Devices Inc		$6,828 48	$8,279 79
Anthem Inc fka Wellpoint Inc		$6,193 16	$7,425 33
Apollo Glbl Mngmt LLC		$50,797.54	$52,580.00
Apple Inc		$15,330 08	$17,430 69
Applied Materials Inc		$13,430.04	$19,987 92
Arcbest Corp		$5,049 92	$5,577 00
Arch Coal Inc		$17,085.26	$20,588 36
Assurant Inc		$25,252 89	$26,319 24
Bank of America Corp		$4,914 42	$6,405 84
Baxter Intl Inc		$5,630 49	$7,304 32
Best Buy Co Inc		$10,229.27	$14,652 58
Boeing Co		$26,774.12	$58,392.18
Cabot Microelectronics Corp		$5,484 84	$6,585 60
Cadence Design System		$25,803.56	$28,312.14
Capital One Financial Co		$100,000 00	$107,680 00
CBS Corp new Cl B Shrs		$10,374 55	$8,909 00
CDK Global Inc Com		$6,140.15	$7,128.00
Celanese Corp Series A Com Stk		$7,369 98	$7,388 52
Centene Corp		$4,961 59	$6,658 08
Centurylink Inc		$11,261 21	$8,490 12
Charles River Labs Intl Inc		$8,380.72	$7,770 95
Chemed Corp		$7,460.55	$8,748 72
CitiGroup Inc		$253,847.99	$113,103.20
Cognizant Tech Solutions Cl A		$9,492 20	$9,516 68
Conagra Brands Inc		$8,197 16	$8,965 46
Cooper Co Inc New		$7,861 73	$7,190 04
Corning Inc		$18,932.47	$22,169 07
CVS Health Corp Com		$13,535.85	$12,470 00
Diamond Offshore Drilling Inc		$9,350 76	$11,953.37
E*Trade Financial Corp New Com		$4,728 22	$6,642 38
Electronic Arts Inc		$7,397.11	$6,618 78
Ennis Inc		$7,272 26	$7,781.25
Entravsn Communications		$5,879 84	$5,605 60
Eplus Inc		$2,880.40	$3,008 00
Express Scripts Hldg Co COm		$11,875 85	$13,957 68
Fifth 3rd Bancorp Ohio		$4,478 88	$5,188.14
Gabelli Nat Res		$93,238.00	$33,550.00
Gap Inc		$6,862.68	$6,846 06
General Electric Co		$169,685 55	$92,205 80
General Mills Inc		$11,946.73	$13,103 09

SOKA'PIIWA FOUNDATION **83-0321664**
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Statement 8

Genl Dynamics Corp	$12,453 42	$13,020 80
Gilead Sciences Inc	$15,820 98	$15,044 40
Goldman Sachs Group Inc	$11,337 59	$12,992 76
H&R Block Inc	$13,469.51	$17,226 54
Idexx Labs	$21,634 45	$22,675 10
Intuitive Surgical Inc	$11,416.28	$12,407 96
JPMorgan Chase & Co	$17,681 24	$20,104 72
Kohl's Corp	$5,055 91	$6,941.44
Lakeland Bancorp Inc N J	$5,151 14	$5,274.50
LAM Research Corp	$12,882.43	$13,989.32
Louisiana Pacific Corp	$13,362.43	$14,758 12
Lyondellbasell NV Cl A	$9,314 61	$13,128 08
Marathon Petroleum Corp	$17,774 58	$20,453 80
McDonalds Corp	$32,286 39	$47,333 00
McKesson Corp	$6,820 39	$6,861.80
Medifast Inc	$10,663.83	$11,867.70
Meta Fncl Grp Inc	$3,392 57	$3,520 70
Michael Kors Holdings Ltd	$12,569 04	$16,304 05
Motorola Solutions Inc	$8,819 34	$9,214 68
NVR Inc New	$6,758.00	$7,016.44
Peabody Energy Corp	$324,597 35	$52,125 88
Preferred Bank Com Stock New	$5,060.39	$5,819 22
Procter & Gamble Co	$28,873 79	$29,493.48
Progressive Corp Ohio	$7,988 05	$12,108 80
Prudential Financial Inc	$7,753 57	$8,623 50
Pulte Group Inc	$8,647 15	$9,443 00
Quality Syst	$5,606 67	$4,861 64
Quest Diagnostics Inc	$6,664.22	$6,007 89
Realogy Holdings Corp	$7,425 41	$7,022.50
Regions Financial Corp New	$17,057.20	$18,783 36
Rockwell Automation Inc	$17,668.70	$20,224 05
S P Plus Corp	$9,455 70	$9,126 60
Sanmina Corp	$8,726 36	$7,161 00
Seagate Technology Hldgs	$4,122.45	$7,070.96
Signet Jewelers Ltd	$25,471 38	$18,548 40
Steel Dynamics Inc	$8,111 39	$9,402 34
Sysco Corp	$3,952 60	$4,736 94
Target Corp	$9,971 94	$10,896 75
Teradata Corp	$5,028 42	$6,961.26
Total System Svcs	$12,355.49	$13,998.93
Travelers Companies	$5,277 45	$8,002.76
Travelport Worldwide Ltd	$10,372.14	$8,743 83
Trinseo S A	$11,714.71	$12,777 60
TTEC fkaTeletech Holdings Inc	$14,347 49	$14,168.00
United Continental Hldgs Inc	$16,739 88	$16,310 80
United Technologies Corp	$7,112 08	$8,292.05
V F Corp	$6,414.29	$7,400.00
Valero Energy Cp Dela New	$25,393 74	$32,168 50
Wabash Natl Corp	$3,507.66	$4,101 30

SOKA'PIIWA FOUNDATION **83-0321664**
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Statement 8

Wal-Mart Stores Inc	$10,439 40	$13,331 25
Waters Corp	$4,391 94	$5,216 13
Western Digital Corp	$7,273.45	$6,919 11
Western Un Co	$15,730 53	$15,854.34
Xilinx Inc	$2,672 60	$3,101 32
Yum Brands Inc	$11,710 02	$20,157.67
Zions Bancorp	$13,108.98	$17,180 54
	$2,044,918 76	$1,665,295 60

FORM 990-PF, PART II, LINE 10c	CORPORATE BONDS	Book Value	Fair Market Value
Mellon Capital IV		$86,706 50	$94,250 00
MS Market Linked Note		$100,000.00	$99,125.00
PNC Financial Services		$4,139 34	$5,050 15
		$190,845 84	$198,425 15

SOKA'PIIWA FOUNDATION **83-0321664**
Form 990-PF Part IV Detail
Statement 9

Line 1a: Short-Term Capital Gain

Description of Property	Date Acquired	Date Sold	Sales Price	Cost Basis	Gain (Loss)
Sold 21 shares of Total System Svcs	1/21/16	01/04/2017	$1,091 22	$958 02	$133 20
Sold 15 shares of Lancaster Colony Crp	1/21/16	01/04/2017	$2,144 60	$1,759 50	$385 10
Sold 23 shares of Verisign Inc	1/21/16	01/04/2017	$1,818 34	$1,713 50	$104 84
Sold 58 shares of International Seaways Inc	12/6/16	01/04/2017	$862 52	$737 76	$124 76
Sold 151 shares of PDL Biopharma Inc	1/21/16	01/04/2017	$333 72	$473 04	($139 32)
Sold 63 shares of Cisco Sys Inc	9/27/16	01/31/2017	$1,934 68	$1,988 91	($54 23)
Sold 81 shares of Superior Indust Intl (De)	6/23/16	01/31/2017	$1,868 69	$2,225 26	($356 57)
Sold 7 shares of Tesoro Petroleum Cp	10/26/16	01/31/2017	$558 24	$587 84	($29 60)
Sold 21 shares of Fluor Corp New	10/26/16	02/28/2017	$1,158 04	$1,061 29	$96 75
Sold 12 shares of Kimberly Clark Corp	6/23/16,7/26/16	02/28/2017	$1,593 93	$1,598 76	($4 83)
Sold 7 shares of Tech Data Corp	3/22/16	02/28/2017	$611 16	$549 43	$61 73
Sold 48 shares of CSG Systems Intl Inc	7/26/16	02/28/2017	$1,896 79	$1,993 95	($97 16)
Sold 130 shares of Rayonier Advanced Matls Inc	7/26/16	02/28/2017	$1,686 91	$1,921 40	($234 49)
Sold 4,000 shares of Qwest Corp	8/12/16	03/02/2017	$97,317 26	$100,000 00	($2,682 74)
Sold 230 shares of H & R Block Inc	4/19/16,5/24/16	04/05/2017	$5,339 75	$5,441 57	($101 82)
Sold 84 shares of Intl Game Technology	2/28/17	04/05/2017	$1,982 59	$2,263 80	($281 21)
Sold 440 shares of Overseas Shiphldng Grp Inc C-A	9/27/16,1/31/17	04/11/2017	$1,613 13	$2,482 48	($869 35)
Sold 3 shares of C R Bard Inc NJ	6/23/16	04/24/2017	$910 32	$690 82	$219 50
Sold 130 shares of CU Bancorp Calif Com	4/6/17	04/24/2017	$4,903 32	$5,048 16	($144 84)
Sold 18 shares of Stryker Corp	6/23/16,7/26/16	05/02/2017	$2,456 05	$2,106 53	$349 52
Sold 19 shares of Philip Morris Intl Inc	6/23/16	05/02/2017	$1,403 97	$1,216 46	$187 51
Sold 30 shares of Discover Fincl Svcs	1/4/17	05/02/2017	$1,843 15	$2,215 43	($372 28)
Sold 28 shares of Accenture Plc Ireland Cl A	6/23/16,7/26/16,10/26/16	06/06/2017	$3,539 76	$3,258 35	$281 41
Sold 60 shares of AES Corp	6/23/16	06/06/2017	$716 00	$712 59	$3 41
Sold 53 shares of Fresh Del Monte Produce Inc	7/26/16,5/2/17	06/06/2017	$2,674 39	$3,018 95	($344 56)
Sold 67 shares of AT&T Inc	7/26/16	07/06/2017	$2,510 08	$2,855 71	($345 63)
Sold 188 shares of Sierra Bancorp	4/5/17	07/06/2017	$4,645 67	$4,988 45	($342 78)
Sold 165 shares of VLG Supermk A New	04/05/2017	07/06/2017	$4,070 57	$4,324 65	($254 08)
Sold 52 shares of Verizon Communications	7/26/16	07/06/2017	$2,269 61	$2,861 18	($591 57)
Sold 55 shares of Argan Inc	11/30/16,4/5/17	07/06/2017	$3,265 00	$3,552 57	($287 57)
Sold 82 shares of Stock Yds Bancorp Inc	1/31/17,5/2/17	07/06/2017	$3 205 41	$3,603 05	($397 64)
Sold 36 shares of Magellan Health Inc	9/27/16	07/06/2017	$2,593 31	$1,949 71	$643 60
Sold 43 shares of Ross Stores Inc	11/29/16,1/31/17	07/06/2017	$2,425 61	$2,906 44	($480 83)
Sold 70 shares of Hawaiian Electric Ind	1/31/17	07/06/2017	$2,249 49	$2,334 01	($84 52)
Sold 101 shares of Pier 1 Imports Inc	7/26/16	07/06/2017	$496 91	$512 67	($15 76)
Sold 56 shares of Cincinnati Financial Ohio	7/26/16	07/06/2017	$4,055 99	$4,185 47	($129 48)
Sold 13 shares of Ulta Beauty Inc	8/24/16,10/26/16	08/09/2017	$3,257 55	$3,466 68	($209 13)
Sold 54 shares of LCI Inds	10/4/16,10/26/16,5/2/17	08/09/2017	$5,147 38	$5,335 90	($188 52)
Sold 45 shares of Leggett & Platt Inc	10/26/16	08/09/2017	$2,147 43	$2,038 05	$109 38
Sold 45 shares of Cal Maine Foods Inc	10/26/16,5/2/17	08/09/2017	$1,607 15	$1,665 66	($58 51)
Sold 263 shares of LSC Communications Inc Com	3/1/17,4/5/17,5/2/17	09/06/2017	$4,229 73	$6,684 97	($2,455 24)
Sold 66 shares of Universal Cp Va	1/31/17,4/5/17	09/06/2017	$3,751 24	$4,597 20	($845 96)
Sold 67 shares of U S Bancorp Com New	1/31/17	09/06/2017	$3,414 24	$3,524 20	($109 96)
Sold 75 shares of HCI Group Inc	1/31/17,4/5/17	09/06/2017	$2,409 98	$3,145 99	($736 01)
Sold 20 shares of UGI Corp New Com	10/26/16	09/06/2017	$979 77	$904 74	$75 03
Sold 73 shares of Spok Hldgs Inc	5/2/17	10/12/2017	$1,244 65	$1,295 96	($51 31)
Sold 412 shares of IDT Corp Cl B	1/31/17,4/13/17	10/12/2017	$5,369 42	$6,250 29	($880 87)
Sold 47 shares of Garmin Ltd Shs	10/26/16,5/2/17	10/12/2017	$2,562 41	$2,432 47	$129 94
Sold 39 shares of United Therapeutics Corp	11/29/16,4/5/17	10/12/2017	$4,691 86	$4,902 76	($210 90)
Sold 1,197 shares of Office Depot	4/5/17	10/12/2017	$4,462 43	$5,729 56	($1,267 13)
Sold 50 shares of Masimo Corp	4/7/17,5/2/17	10/12/2017	$4,276 49	$4,709 76	($433 27)
Sold 19 shares of Ill Tool Works Inc	10/26/16	10/12/2017	$2,902 41	$2,149 87	$752 54
Sold 28 shares of Hallador Energy Co	4/12/17	10/16/2017	$154 83	$225 41	($70 58)
Sold 133 shares of Hallador Energy Co	4/12/17,4/13/17	10/19/2017	$712 63	$1,070 97	($358 34)
Sold 45 shares of Hallador Energy Co	4/13/17	10/20/2017	$244 49	$363 00	($118 51)
Sold 66 shares of Yum Brands Inc	11/29/16	11/08/2017	$5,356 65	$4,207 21	$1,149 44
Sold 100 shares of Dillards Inc Cl A	2/28/17,4/7/17,5/2/17	11/08/2017	$5,009 32	$5,293 84	($284 52)
Sold 55 shares of Sanmina Corp	1/31/17,4/5/17	11/08/2017	$1,839 70	$2,188 10	($348 40)
Sold 36 shares of Greenbrier Cos Inc	4/5/17	11/08/2017	$1,776 33	$1,704 60	$71 73
Sold 407 shares of Hallador Energy Co	4/13/17	11/10/2017	$2,179 87	$3,283 10	($1,103 23)
Sold 3,959 shares of PDL Biopharma Inc	9/6/17,10/12/17,11/8/17	11/21/2017	$11,276 94	$12,609 79	($1,332 85)

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Sold 4 shares of Northrop Grumman Cp(Hldg Co)	1/4/17	12/13/2017	$1,235 97	$941 28	$294 69
Sold 43 shares of Yum Brands Inc	1/4/17	12/13/2017	$3,543 45	$2,736 70	$806 75
Sold 9 shares of Lockheed Martin Corp	1/4/17	12/13/2017	$2,863 32	$2,283 98	$579 34
Sold 115 shares of Worthington Industries	8/9/17	12/13/2017	$4,901 18	$5,852 32	($951 14)
Sold 4 shares of Meta Fincl Grp Inc	1/6/17	12/13/2017	$367 23	$410 48	($43 25)
Total Short-Term Capital Gain			$267,962 23	$282,102 55	($14,140 32)

Line 1b: Long-Term Capital Gain

Description of Property	Date Acquired	Date Sold	Sales Price	Cost Basis	Gain (Loss)
Sold 210 shares of Verizon Communications	10/27/15,11/17/15	01/04/2017	$11,462 64	$9,507 40	$1,955 24
Sold 236 shares of Seagate Technology Plc	12/16/2015	01/04/2017	$9,368 16	$8,123 00	$1,245 16
Sold 191 shares of National Oilwell Varco Inc	10/22/15,11/17/15,12/16/1	01/04/2017	$7,335 54	$7,089 51	$246 03
Sold 73 shares of Motorola Solutions Inc	11/17/15,12/15/15	01/04/2017	$6,097 21	$5,154 02	$943 19
Sold 63 shares of Caterpillar In	3/17/15,4/20/15	01/04/2017	$5,911 78	$5,010 00	$901 78
Sold 164 shares of Quanta Services Inc	12/16/2015	01/04/2017	$5,750 01	$3,367 54	$2,382 47
Sold 70 shares of Paychex Inc	11/17/15,12/15/15	01/04/2017	$4,294 87	$3,723 83	$571 04
Sold 59 shares of Total System Svcs	11/19/15,12/16/15	01/04/2017	$3,065 82	$3,267 57	($201 75)
Sold 60 shares of Altria Group Inc	10/16/2014	01/04/2017	$4,118 84	$2,702 77	$1,416 07
Sold 30 shares of Clorox Co	10/22/15,11/17/15,12/15/1	01/04/2017	$3,642 78	$3,687 28	($44 50)
Sold 29 shares of Dr Pepper Snapple Group Inc	9/11/147,10/16/14	01/04/2017	$2,651 12	$1,800 19	$850 93
Sold 27 shares of Global Payment Inc	12/15/2015	01/04/2017	$1,932 66	$1,930 30	$2 36
Sold 15 shares of Accenture Plc Ireland	12/15/2015	01/04/2017	$1,755 33	$1,604 12	$151 21
Sold 12 shares of Travelers Companies Inc Com	6/7/12,8/8/12	01/04/2017	$1,450 02	$754 82	$695 20
Sold 12 shares of Kimberly Clark Corp	12/15/2015	01/04/2017	$1,380 94	$1,492 64	($111 70)
Sold 35 shares of H & R Block Inc	12/15/2015	01/04/2017	$814 78	$1,143 87	($329 09)
Sold 29 shares of Tech Data Corp	12/16/2015	01/06/2017	$2,503 75	$1,956 86	$546 89
Sold 139 shares of Caterpillar Inc	4/20/15,8/14/15,9/17/15,1(	01/31/2017	$13,254 56	$11,064 74	$2,189 82
Sold 94 shares of Apple Inc	4/20/15,5/18/15,1/21/16	01/31/2017	$11,381 16	$11,215 03	$166 13
Sold 159 shares of Seagate Technology Plc	12/16/15,1/21/16	01/31/2017	$7,146 84	$4,634 51	$2,512 33
Sold 139 shares of National Oilwell Varco Inc	12/16/15,1/21/16	01/31/2017	$5,240 88	$4,655 76	$585 12
Sold 67 shares of Avery Dennison Corp	8/28/15,12/15/15	01/31/2017	$4,887 61	$4,035 34	$852 27
Sold 60 shares of Motorola Solutions Inc	12/15/2015	01/31/2017	$4,827 83	$4,181 80	$646 03
Sold 65 shares of Altria Group Inc	10/16/14,1/20/15,10/22/15	01/31/2017	$4,634 42	$3,711 08	$923 34
Sold 92 shares of Enterprise Fincl Svcs Corp	01/22/2016	01/31/2017	$3,801 07	$2,432 64	$1,368 43
Sold 40 shares of Dr Pepper Snapple Group Inc	10/16/2014	01/31/2017	$3,648 36	$2,445 22	$1,203 14
Sold 42 shares of Rex American Resources Corp	9/17/15,1/21/16	01/31/2017	$3,474 29	$2,134 29	$1,340 00
Sold 21 shares of Boeing Co	1/20/15 2/12/15	01/31/2017	$3,455 70	$2,915 97	$539 73
Sold 28 shares of Kimberly Clark Corp	12/15/15,1/21/16	01/31/2017	$3,397 24	$3,490 73	($93 49)
Sold 27 shares of Clorox Co	12/15/15,1/21/16	01/31/2017	$3,245 27	$3,485 21	($239 94)
Sold 24 shares of Equifax Inc	01/21/2016	01/31/2017	$2,806 31	$2,471 60	$334 71
Sold 50 shares of Quanta Services Inc	12/16/2015	01/31/2017	$1,793 03	$1,026 69	$766 34
Sold 12 shares of Tesoro Petroleum Cp	12/2/14,7/20/15	01/31/2017	$956 98	$1,082 55	($125 57)
Sold 9 shares of McDonalds Corp	08/28/2015	01/31/2017	$1,103 64	$864 00	$239 64
Sold 60 shares of Navient Corp Com	10/22/2015	01/31/2017	$895 91	$780 18	$115 73
Sold 137 shares of Caterpillar Inc	10/22/15,11/17/15,12/15/1	02/28/2017	$13,262 02	$9,755 36	$3,506 66
Sold 287 shares of National Oilwell Varco Inc	1/21/16,2/17/16	02/28/2017	$11,648 73	$8,409 22	$3,239 51
Sold 164 shares of Seagate Technology Plc	1/21/16,2/17/16	02/28/2017	$7,892 52	$5,008 31	$2,884 21
Sold 69 shares of Motorola Solutions Inc	12/15/15,1/21/16	02/28/2017	$5,466 30	$4,416 88	$1,049 42
Sold 26 shares of Clorox Co	1/21/16,2/18/16	02/28/2017	$3,555 53	$3,329 82	$225 71
Sold 42 shares of Fluor Corp New	02/17/2016	02/28/2017	$2,316 09	$1,953 97	$362 12
Sold 68 shares of Verizon Communications	11/17/15,12/15/15	02/28/2017	$3,363 23	$3,094 40	$268 83
Sold 13 shares of Kimberly Clark Corp	1/21/16,2/17/16	02/28/2017	$1,726 76	$1,660 25	$66 51
Sold 35 shares of Dr Pepper Snapple Group Inc	10/16/14,12/2/14,1/20/15	02/28/2017	$3,282 81	$2,459 59	$823 22
Sold 22 shares of Tech Data Corp	2/17/16,3/22/16	02/28/2017	$1,859 06	$1,554 89	$304 17
Sold 15 shares of United Parcel Ser Inc Cl-B	02/17/2016	02/28/2017	$1,595 03	$1,483 80	$111 23
Sold 4 shares of Northrop Grumman Cp(Hldg Co)	01/21/2016	02/28/2017	$988 94	$728 00	$260 94
Sold 645 shares of H & R Block Inc	12/15/15,1/21/16,2/17/16,	04/05/2017	$14,974 50	$20,121 75	($5,147 25)
Sold 514 shares of Quanta Services Inc	12/16/15,1/21/16,2/17/16	04/05/2017	$18,377 76	$9,591 53	$8,786 23
Sold 122 shares of Travelers Companies Inc Com	8/8/12,9/5/12,11/8/12	04/05/2017	$14,782 08	$8,261 28	$6,520 80
Sold 171 shares of Motorola Solutions Inc	1/21/16,2/18/16,3/22/16	04/05/2017	$14,434 37	$11,516 61	$2,917 76
Sold 127 shares of Lyondellbasell NV Cl-A	10/16/14,12/2/14,2/12/15,	04/05/2017	$11,432 29	$10,308 04	$1,124 25
Sold 216 shares of Seagate Technology Plc	2/17/16,3/22/16	04/05/2017	$10,078 21	$7,684 12	$2,394 09
Sold 205 shares of General Electric Co	03/11/2005	04/05/2017	$6,200 33	$7,360 53	($1,160 20)

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Sold 36 shares of McDonalds Corp	8/28/15,9/17/15	04/05/2017	$4,718 64	$3,521 61	$1,197 03
Sold 36 shares of United Parcel Ser Inc Cl-B	2/17/16,3/22/16	04/05/2017	$3,857 92	$3,759 66	$98 26
Sold 59 shares of Verizon Communications	12/15/2015	04/05/2017	$2,917 21	$2,693 77	$223 44
Sold 25 shares of Altria Group Inc	10/22/15,12/15/15	04/05/2017	$1,801 87	$1,476 99	$324 88
Sold 6 shares of Northrop Grumman Cp(Hldg Co)	01/21/2016	04/05/2017	$1,422 69	$1,092 00	$330 69
Sold 9 shares of Stryker Corp	03/22/2016	04/05/2017	$1,185 04	$942 48	$242 56
Sold 0 99 shares of Peabody Energy,Cash in LieuofFrac	9/30/14-4/30/15	04/05/2017	$27 53	$322 62	($295 09)
Sold 0 06 shares of Peabody Energy,Cash in LieuofFrac	08/25/2015	04/05/2017	$1 70	$7 36	($5 66)
Sold 621 shares of Navient Corp Com	10/22/15,3/22/16	04/06/2017	$9,068 95	$7,919 34	$1,149 61
Sold 14 shares of C R Bard Inc NJ	09/17/2015	04/24/2017	$4,248 17	$2,741 52	$1,506 65
Sold 192 shares of Seagate Technology Plc	04/19/2016	05/02/2017	$8,114 78	$4,880 91	$3,233 87
Sold 411 shares of Navient Corp Com	04/19/2016	05/02/2017	$6,320 09	$5,333 88	$986 21
Sold 71 shares of Motorola Solutions Inc	3/22/16,4/20/16	05/02/2017	$6,095 46	$5,324 58	$770 88
Sold 17 shares of Stryker Corp	3/22/16,4/19/16	05/02/2017	$2,219 60	$1,716 72	$502 88
Sold 23 shares of Philip Morris Intl Inc	05/24/2016	05/02/2017	$2,539 11	$2,260 06	$279 05
Sold 55 shares of American Express Co	02/17/2016	05/02/2017	$4,368 56	$2,949 03	$1,419 53
Sold 78 shares of Verizon Communications	12/15/15,3/22/16,4/19/16	05/02/2017	$3,581 29	$3,991 64	($410 35)
Sold 83 shares of Quanta Services Inc	2/17/16,3/22/16	05/02/2017	$2,947 06	$1,552 73	$1,394 33
Sold 30 shares of Marsh & Mclennan Cos Inc	03/22/2016	05/02/2017	$2,228 89	$1,800 90	$427 99
Sold 288 shares of Seagate Technology Plc	05/24/2016	06/06/2017	$12,027 21	$6,038 87	$5,988 34
Sold 220 shares of H & R Block Inc	05/24/2016	06/06/2017	$5,827 47	$4,487 45	$1,340 02
Sold 163 shares of Quanta Services Inc	03/22/2016	06/06/2017	$5,101 36	$3,713 52	$1,387 84
Sold 30 shares of McDonalds Corp	09/17/2015	06/06/2017	$4,553 56	$2,958 73	$1,594 83
Sold 61 shares of Cincinnati Financial Ohio	05/24/2016	06/06/2017	$4,243 11	$4,186 08	$57 03
Sold 3 shares of Accenture Plc Ireland Cl A	12/15/2015	06/06/2017	$379 26	$320 83	$58 43
Sold 46 shares of Avery Dennison Corp	12/15/15,1/21/16	06/06/2017	$3,851 39	$2,848 64	$1,002 75
Sold 170 shares of AES Corp	05/24/2016	06/06/2017	$2,028 65	$1,817 15	$211 50
Sold 35 shares of Marsh & Mclennan Cos Inc	3/22/16,4/19/16	06/06/2017	$2,690 09	$2,137 81	$552 28
Sold 28 shares of TE Connectivity Ltd New	05/24/2016	06/06/2017	$2,220 32	$1,643 90	$576 42
Sold 30 shares of Sysco Corp	03/22/2016	06/06/2017	$1,653 18	$1,393 74	$259 44
Sold 12 shares of United Technologies Corp	03/22/2016	06/06/2017	$1,440 17	$1,186 53	$253 64
Sold 5 shares of Northrop Grumman Cp(Hldg Co)	01/21/2016	06/06/2017	$1,273 14	$910 00	$363 14
Sold $100,000 Resolute Forest P	05/29/2015	06/30/2017	$96,280 50	$93,785 50	$2,495 00
Sold 118 shares of TE Connectivity Ltd New	5/24/16,6/23/16	07/06/2017	$9,223 20	$7,306 25	$1,916 95
Sold 93 shares of Lyondellbasell NV Cl-A	3/17/15,4/20/15,5/18/15,6/	07/06/2017	$7,793 38	$8,520 07	($726 69)
Sold 63 shares of United Technologies Corp	3/22/16,4/19/16	07/06/2017	$7,723 48	$6,398 98	$1,324 50
Sold 235 shares of H & R Block Inc	06/23/2016	07/06/2017	$7,338 60	$5,381 50	$1,957 10
Sold 83 shares of American Express Co	2/17/16,5/24/16	07/06/2017	$6,992 47	$5,028 76	$1,963 71
Sold 83 shares of Marsh & Mclennan Cos Inc	06/23/2016	07/06/2017	$6,482 32	$5,623 17	$859 15
Sold 161 shares of Quanta Services Inc	3/22/16,4/19/16	07/06/2017	$5,320 65	$3,676 58	$1,644 07
Sold 20 shares of Northrop Grumman Cp(Hldg Co)	5/24/16,6/23/16	07/06/2017	$5,207 51	$4,303 86	$903 65
Sold 71 shares of AT&T Inc	06/23/2016	07/06/2017	$2,659 94	$2,949 34	($289 40)
Sold 53 shares of Avery Dennison Corp	1/21/16,2/17/16,6/23/16	07/06/2017	$4,720 97	$3,886 02	$834 95
Sold 37 shares of Travelers Companies Inc Com	11/08/2012	07/06/2017	$4,673 55	$2,558 26	$2,115 29
Sold 83 shares of Sysco Corp	3/22/16,4/19/13,5/24/16	07/06/2017	$4,092 14	$3,954 06	$138 08
Sold 29 shares of Verizon Communications	4/19/16,6/23/16	07/06/2017	$1,265 75	$1,532 01	($266 26)
Sold 145 shares of Wabash Natl Corp	06/23/2016	07/06/2017	$3,194 49	$1,921 03	$1,273 46
Sold 67 shares of Sanmina Corp	06/23/2016	07/06/2017	$2,536 02	$1,886 43	$649 59
Sold 283 shares of Pier 1 Imports Inc	03/22/2016	07/06/2017	$1,392 32	$1,929 10	($536 78)
Sold 1 share of Cincinnati Financial Ohio	05/24/2016	07/06/2017	$72 43	$68 62	$3 81
Sold $100,000 Frontier Commn	09/30/2014	07/19/2017	$76,889 50	$101,241 50	($24,352 00)
Sold 80 shares of Boeing Co	2/12/15,3/17/15,4/20/15	08/09/2017	$18,805 99	$12,177 29	$6,628 70
Sold 66 shares of Nvidia Corp	07/26/2016	08/09/2017	$11,280 62	$3,720 04	$7,560 58
Sold 122 shares of United Continental Hldgs Inc	07/26/2016	08/09/2017	$8,236 72	$5,794 06	$2,442 66
Sold 15 shares of Ulta Beauty Inc	6/23/16,7/26/16	08/09/2017	$3,758 72	$3,733 35	$25 37
Sold 93 shares of Waste Mgmt Inc (Dela)	6/23/16,7/26/16	08/09/2017	$7,002 44	$5,965 35	$1,037 09
Sold 83 shares of TE Connectivity Ltd New	6/23/16,7/26/16	08/09/2017	$6,705 42	$5,109 65	$1,595 77
Sold 145 shares of H & R Block Inc	07/26/2016	08/09/2017	$4,473 46	$3,485 25	$988 21
Sold 84 shares of Sysco Corp	5/24/16,6/23/16	08/09/2017	$4,326 52	$4,193 16	$133 36
Sold 37 shares of Leggett & Platt Inc	07/26/2016	08/09/2017	$1,765 67	$1,987 12	($221 45)
Sold 46 shares of Cal Maine Foods Inc	06/23/2016	08/09/2017	$1,642 87	$1,907 87	($265 00)
Sold 24 shares of Johnson & Johnson	07/26/2016	08/09/2017	$3,191 58	$3,001 86	$189 72
Sold 73 shares of Quanta Services Inc	04/19/2016	08/09/2017	$2,668 85	$1,671 51	$997 34

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Sold 43 shares of UGI Corp New Com	06/23/2016	08/09/2017	$2,062 97	$1,903 73	$159 24
Sold 28 shares of Tnnseo S A	07/26/2016	08/09/2017	$1,686 74	$1,434 15	$252 59
Sold 132 shares of United Continental Hldgs Inc	08/24/2016	09/06/2017	$7,908 46	$6,309 23	$1,599 23
Sold 100 shares of TE Connectivity Ltd New	7/26/16,8/24/16	09/06/2017	$7,861 45	$6,290 12	$1,571 33
Sold 86 shares of Amencan Express Co	5/24/16,6/23/16	09/06/2017	$7,328 49	$5,465 04	$1,863 45
Sold 54 shares of Travelers Companies Inc Com	11/8/12-7/17/14	09/06/2017	$6,314 53	$4,629 56	$1,684 97
Sold 38 shares of Nvidia Corp	08/24/2016	09/06/2017	$6,309 28	$2,377 51	$3,931 77
Sold 38 shares of Ill Tool Works Inc	07/20/2015	09/06/2017	$5,195 96	$3,553 57	$1,642 39
Sold 86 shares of Quanta Services Inc	4/19/16,5/24/16	09/06/2017	$3,067 17	$1,961 51	$1,105 66
Sold 59 shares of Unumprovident Corp	07/26/2016	09/06/2017	$2,816 56	$1,915 09	$901 47
Sold 106 shares of H & R Block Inc	7/26/16,8/24/16	09/06/2017	$2,763 33	$2,559 98	$203 35
Sold 13 shares of McDonalds Corp	9/17/15,10/22/15	09/06/2017	$2,064 64	$1,392 17	$672 47
Sold 17 shares of UGI Corp New Com	06/23/2016	09/06/2017	$832 81	$752 64	$80 17
Sold 6 shares of Boeing Co	04/20/2015	09/06/2017	$1,415 27	$919 69	$495 58
Sold 91 shares of Mc Donalds Corp	10/22/15,11/17/15	10/12/2017	$14,935 69	$10,037 13	$4,898 56
Sold 57 shares of Nvidia Corp	10/11/2016	10/12/2017	$10,918 12	$3,741 92	$7,176 20
Sold 110 shares of Amencan Express Co	6/23/16,7/26/16,8/24/16	10/12/2017	$10,123 13	$7,014 49	$3,108 64
Sold 218 shares of Quanta Services Inc	05/24/2016	10/12/2017	$8,174 24	$4,915 71	$3,258 53
Sold 92 shares of TE Connectivity Ltd New	8/24/16,9/27/16	10/12/2017	$8,031 83	$5,903 25	$2,128 58
Sold 117 shares of United Continuental Hldgs Inc	09/27/2016	10/12/2017	$7,875 00	$5,902 81	$1,972 19
Sold 80 shares of Lyondellbasell NV Cl-A	6/18/15,/20/15,8/24/16	10/12/2017	$7,759 47	$7,158 51	$600 96
Sold 323 shares of General Electnc Co	03/11/2005	10/12/2017	$7,413 35	$11,597 32	($4,183 97)
Sold 58 shares of Travelers Cos	7/17/14,8/13/14	10/12/2017	$7,301 94	$5,343 67	$1,958 27
Sold 264 shares of H & R Block Inc	8/24/16,9/27/16	10/12/2017	$6,833 90	$6,359 79	$474 11
Sold 279 shares of Spok Hldgs Inc	8/18/15,1/22/16	10/12/2017	$4,756 95	$4,665 12	$91 83
Sold 64 shares of Texas Instruments	09/27/2016	10/12/2017	$5,949 64	$4,439 99	$1,509 65
Sold 88 shares of Altna Group Inc	12/15/15,1/21/16	10/12/2017	$5,728 66	$5,064 27	$664 39
Sold 14 shares of Ill Tool Works Inc	7/20/15,9/27/16	10/12/2017	$2,138 61	$1,644 85	$493 76
Sold 41 shares of Garmin Ltd Shs	09/27/2016	10/12/2017	$2,235 30	$2,012 08	$223 22
Sold 12 shares of Boeing Co	4/20/15,5/18/15	10/12/2017	$3,151 98	$1,777 53	$1,374 45
Sold 20 shares of Aon Plc Shs Cl-A	09/27/2016	10/12/2017	$2 977 13	$2,257 40	$719 73
Sold 16 shares of Waters Corp	01/21/2016	10/12/2017	$2,965 97	$1,996 52	$969 45
Sold 57 shares of Greenbner Cos Inc	09/27/2016	10/12/2017	$2,846 29	$1,960 69	$885 60
Sold 46 shares of Unumprovident Corp	7/26/16,8/24/16	10/12/2017	$2,405 14	$1,578 02	$827 12
Sold 43 shares of Nvidia Corp	10/11/16,10/26/16	11/08/2017	$9,014 15	$3,063 42	$5,950 73
Sold 59 shares of Travelers Companies Inc Com	8/13/14,9/11/14	11/08/2017	$7,906 45	$5,457 53	$2,448 92
Sold 202 shares of Quanta Services Inc	5/24/16,6/23/16	11/08/2017	$7,272 21	$4,834 53	$2,437 68
Sold 26 shares of Waters Corp	1/21/16,9/27/16,10/26/16	11/08/2017	$5,077 70	$3,942 21	$1,135 49
Sold 56 shares of Pnncipal Finl Group Inc	10/26/2016	11/08/2017	$3,813 91	$2,969 90	$844 01
Sold 50 shares of Sanmina Corp	10/26/2016	11/08/2017	$1,672 46	$1,475 77	$196 69
Sold 54 shares of Baxter Intl Inc	06/23/2016	11/08/2017	$3,487 45	$2,462 97	$1,024 48
Sold 23 shares of Greenbner Cos Inc	10/26/2016	11/08/2017	$1,134 87	$774 51	$360 36
Sold 48 shares of Unumprovident Corp	10/26/2016	11/08/2017	$2,517 86	$1,701 25	$816 61
Sold 45 shares of Best Buy Co	09/27/2016	11/08/2017	$2,517 15	$1,718 65	$798 50
Sold 9 shares of Boeing Co	05/18/2015	11/08/2017	$2,389 84	$1,317 68	$1,072 16
Sold 91 shares of H & R Block Inc	09/27/2016	11/08/2017	$2,254 30	$2,067 45	$186 85
Sold 23 shares of Tnnseo S A.	7/26/16,10/26/16	11/08/2017	$1,641 93	$1,218 15	$423 78
Sold 150 shares of Etsy Inc Com	04/16/2015	11/24/2017	$2,516 71	$2,400 00	$116 71
Bank of Amenca Sec Class Action Settlement Fund	08/28/2014	11/27/2017	$159 24	$0 00	$159 24
Sold 62 shares of Travelers Companies Inc Com	9/11/14-6/23/16	12/13/2017	$8,293 97	$6,493 18	$1,800 79
Sold 26 shares of Boeing Co	5/18/15,6/18/15	12/13/2017	$7,589 53	$3,796 37	$3,793 16
Sold 17 shares of Northrop Grumman Cp(Hldg Co)	7/26/16,10/26/16	12/13/2017	$5,252 89	$3,818 96	$1,433 93
Sold 33 shares of Yum Brands Inc	11/29/2016	12/13/2017	$2,719 39	$2,103 61	$615 78
Sold 10 shares of Lockheed Martin Corp	5/24/16,6/23/16	12/13/2017	$3,181 46	$2,402 97	$778 49
Sold 188 shares of H & R Block Inc	9/27/16,10/26/16,11/29/16	12/13/2017	$5,138 95	$4,281 46	$857 49
Sold 50 shares of Amencan Express Co	08/24/2016	12/13/2017	$4,931 01	$3,273 93	$1,657 08
Sold 62 shares of United Continental Hldgs Inc	9/27/16,10/26/16	12/13/2017	$3,883 49	$3,323 82	$559 67
Sold 37 shares of Assurant Inc	11/29/2016	12/13/2017	$3,692 88	$3,182 74	$510 14
Sold 57 shares of E*Trade Financial Corp New Com	11/29/2016	12/13/2017	$2,806 01	$1,939 65	$866 36
Sold 36 shares of Advanced Energy Ind Inc	11/29/2016	12/13/2017	$2,510 43	$2,023 65	$486 78
Sold 23 shares of Meta Fncl Grp Inc	11/30/2016	12/13/2017	$2,111 58	$2,141 40	($29 82)
Sold 42 shares of Zions Bancorp	1/4/17	12/13/2017	$2,123 72	$1,355 91	$767 81
Sold 36 shares of Signet Jewelers Ltd	11/29/2016	12/13/2017	$1,948 90	$3,333 09	($1,384 19)

SOKA'PIIWA FOUNDATION **83-0321664**

Form 990-PF Part IV Detail

Statement 9

Sold 11 shares of United Technologies Corp	04/19/2016	12/13/2017	$1,364 24	$1,152 02	$212 22
Sold 70 shares of General Electric Co	03/11/2005	12/13/2017	$1,244 64	$2,513 35	($1,268 71)
Total Long-Term Capital Gain			$1,037,714 78	$869,645 20	$168,069 58

SOKA'PIIWA FOUNDATION
Form 990-PF Part XV Detail
Statement 10

83-0321664

Recipient	Address	Relationship to Soka'piiwa	Purpose	Amount
Church Women United	PO Box 195, Columbia Falls, MT 59912	None	Christina women's movement	5000
Montana Environmental Information Center	PO Box 1184, Helena, MT 59624	None	Protection & Restoration	10000
Montana Public Radio	U of M, 32 Campus Dr , Missoula, MT 59812-8064	None	Enriches the mind & spirit, inspires a lifetime of learning, and connect communities through access to programming	2000
Montana Trout Unlimited	PO Box 7186, Missoula, MT 59807	None	*Conservation & Protection*	12000
Montana Wilderness Association	80 South Warrant St , Helena, MT 59601	None	Protection of Montana Wilderness	10000
Neighbors Helping Neighbors	PO Box 303, Choteau, MT 59422	None	Help Low Income Families	10000
Old Trail Museum	823 North Main, Choteau, MT 59422	None	Preservation & Education	10000
Rocky *Mountain* Front Weed Roundtable	PO Box 663, Choteau, MT 59422	None	Ensuring healthy, diverse lands for all	3500
Ronald McDonald House	5130 40th Ave NE, Seattle, WA 98105	None	Create, find and support programs that directly improve the health and well-being of children & their families	1500
Western Rivers Conservancy	71 SW Oak St , Suite 100, Portland, RE 97204	None	Protection of River Ecosystems	10000
				74000