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Form **990**
Department of the Treasury
Internal Revenue Service

Return of Organization Exempt From Income Tax
Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung
benefit trust or private foundation)
The organization may have to use a copy of this return to satisfy state reporting requirements

OMB No 1545-0047
2007
Open to Public Inspection

A For the 2007 calendar year, or tax year beginning **8/01/07**, and ending **7/31/08**

- B** Check if applicable:
- ☐ Address change
 - ☐ Name change
 - ☐ Initial return
 - ☐ Termination
 - ☐ Amended return
 - ☐ Application pending

Please use IRS label or print or type. See Specific Instructions.

C Name of organization

MONTESSORI SCHOOL OF ANDERSON

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

280 SAM MCGEE ROAD

City or town, state or country, and ZIP + 4

ANDERSON SC 29621

D Employer identification number
57-0570198

E Telephone number
864-226-5344

F Accounting method ☐ Cash
☒ Accrual ☐ Other (specify)

Section 501(c)(3) organizations and 4947(a)(1) nonexempt charitable trusts must attach a completed Schedule A (Form 990 or 990-EZ)

H and I are not applicable to section 527 organizations

H(a) Is this a group return for affiliates? ☐ Yes ☒ No

H(b) If "Yes," enter number of affiliates **▶**

H(c) Are all affiliates included? ☐ Yes ☐ No

(If "No," attach a list. See instructions.)

H(d) Is this a separate return filed by an organization covered by a group ruling? ☐ Yes ☐ No

I Group Exemption Number **▶**

M Check ☐ if the organization is not required to attach Sch B (Form 990, 990-EZ, or 990-PF)

G Website: **MSASC.ORG**

J Organization type

(check only one) ☒ 501(c) (**3**) (insert no) ☐ 4947(a)(1) or ☐ 527

K Check here ☐ if the organization is not a 509(a)(3) supporting organization and its gross receipts are normally not more than \$25,000. A return is not required, but if the organization chooses to file a return, be sure to file a complete return.

L Gross receipts. Add lines 6b, 8b, 9b, and 10b to line 12 **▶ 2,267,733**

Part I Revenue, Expenses, and Changes in Net Assets or Fund Balances (See the instructions)

1 Contributions, gifts, grants, and similar amounts received

a Contributions to donor advised funds

b Direct public support (not included on line 1a)

c Indirect public support (not included on line 1a)

d Government contributions (grants) (not included on line 1a)

e Total (add lines 1a through 1d) (cash \$ **269,860** noncash \$)

2 Program service revenue including government fees and contracts (from Part VII, line 93)

3 Membership dues and assessments

4 Interest on savings and temporary cash investments

5 Dividends and interest from securities

6a Gross rents

b Less rental expenses

c Net rental income or (loss). Subtract line 6b from line 6a

7 Other investment income (describe **▶**)

8a Gross amount from sales of assets other than inventory

b Less cost or other basis and sales expenses

c Gain or (loss) (attach schedule)

d Net gain or (loss). Combine line 8c, columns (A) and (B)

9 Special events and activities (attach schedule). If any amount is from gaming, check here ☐

a Gross revenue (not including \$ of contributions reported on line 1b)

b Less direct expenses other than fundraising expenses

c Net income or (loss) from special events. Subtract line 9b from line 9a

10a Gross sales of inventory, less returns and allowances

b Less cost of goods sold

c Gross profit or (loss) from sales of inventory (attach schedule). Subtract line 10b from line 10a

11 Other revenue (from Part VII, line 103)

12 Total revenue. Add lines 1e, 2, 3, 4, 5, 6c, 7, 8d, 9c, 10c, and 11

13 Program services (from line 44, column (B))

14 Management and general (from line 44, column (C))

15 Fundraising (from line 44, column (D))

16 Payments to affiliates (attach schedule)

17 Total expenses. Add lines 16 and 44, column (A)

18 Excess or (deficit) for the year. Subtract line 17 from line 12

19 Net assets or fund balances at beginning of year (from line 73, column (A))

20 Other changes in net assets or fund balances (attach explanation)

21 Net assets or fund balances at end of year. Combine lines 18, 19, and 20

1a	
1b	269,860
1c	
1d	

1e 269,860

2 1,979,665

3

4 16,663

5

6a	
6b	

6c

7

(A) Securities	(B) Other
8a	
8b	
8c	

8d

9a	
9b	

9c

10a	
10b	

10c

11 1,545

12 2,267,733

13 1,512,204

14 383,105

15 196,603

16

17 2,091,912

18 175,821

19 -87,753

20 0

21 88,068

617 3

Form 990 (2007)

MONTESSORI SCHOOL OF ANDERSON

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Part II Statement of Functional Expenses

All organizations must complete column (A). Columns (B), (C), and (D) are required for section 501(c)(3) and (4) organizations and section 4947(a)(1) nonexempt charitable trusts but optional for others. (See the instructions.)

Do not include amounts reported on line 6b, 8b, 9b, 10b, or 16 of Part I.	(A) Total	(B) Program services	(C) Management and general	(D) Fundraising
22a Grants paid from donor advised funds (attach schedule) (cash \$ _____ non-cash \$ _____) If this amount includes foreign grants, check here ☐	22a			
22b Other grants and allocations (attach schedule) (cash \$ _____ non-cash \$ _____) If this amount includes foreign grants, check here ☐	22b			
23 Specific assistance to individuals (attach schedule)	23			
24 Benefits paid to or for members (attach schedule)	24			
25a Compensation of current officers, directors, key employees, etc. listed in Part V-A SEE STATEMENT 1	25a 76,500	26,500	50,000	
b Compensation of former officers, directors, key employees, etc. listed in Part V-B	25b			
c Compensation and other distributions, not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)	25c			
26 Salaries and wages of employees not included on lines 25a, b, and c	26 1,223,414	1,029,708	173,906	19,800
27 Pension plan contributions not included on lines 25a, b, and c	27			
28 Employee benefits not included on lines 25a - 27	28			
29 Payroll taxes	29 89,829	73,659	14,373	1,797
30 Professional fundraising fees	30			
31 Accounting fees	31			
32 Legal fees	32			
33 Supplies	33 248,636	73,630		175,006
34 Telephone	34			
35 Postage and shipping	35			
36 Occupancy	36 20,000	20,000		
37 Equipment rental and maintenance	37 78,175	56,406	21,769	
38 Printing and publications	38			
39 Travel	39			
40 Conferences, conventions, and meetings	40			
41 Interest	41 127,182	91,766	35,416	
42 Depreciation, depletion, etc. (attach schedule)	42 77,949	56,123	21,826	
43 Other expenses not covered above (itemize) a SEE STATEMENT 2	43a 150,227	84,412	65,815	
b	43b			
c	43c			
d	43d			
e	43e			
f	43f			
g	43g			
44 Total functional expenses. Add lines 22a through 43g. (Organizations completing columns (B)-(D), carry these totals to lines 13-15)	44 2,091,912	1,512,204	383,105	196,603

Joint Costs. Check ☐ if you are following SOP 98-2

Are any joint costs from a combined educational campaign and fundraising solicitation reported in (B) Program services?

▶ ☐ Yes ☒ No

If "Yes," enter (i) the aggregate amount of these joint costs \$ _____, (ii) the amount allocated to Program services \$ _____,

(iii) the amount allocated to Management and general \$ _____, and (iv) the amount allocated to Fundraising \$ _____

Part III Statement of Program Service Accomplishments (See the instructions.)

Form 990 is available for public inspection and, for some people, serves as the primary or sole source of information about a particular organization. How the public perceives an organization in such cases may be determined by the information presented on its return. Therefore, please make sure the return is complete and accurate and fully describes, in Part III, the organization's programs and accomplishments.

What is the organization's primary exempt purpose?

► **SEE STATEMENT 3**

All organizations must describe their exempt purpose achievements in a clear and concise manner. State the number of clients served, publications issued, etc. Discuss achievements that are not measurable (Section 501(c)(3) and (4) organizations and 4947(a)(1) nonexempt charitable trusts must also enter the amount of grants and allocations to others.)

Program Service Expenses

(Required for 501(c)(3) and (4) orgs., and 4947(a)(1) trusts, but optional for others.)

a INSTRUCTION AND STUDENT ACTIVITIES - SEE ATTACHED STMT

(Grants and allocations \$) If this amount includes foreign grants, check here ► ☐

1,296,622

b

(Grants and allocations \$) If this amount includes foreign grants, check here ► ☐

c

(Grants and allocations \$) If this amount includes foreign grants, check here ► ☐

d

(Grants and allocations \$) If this amount includes foreign grants, check here ► ☐

e Other program services (attach schedule) SEE STMT 4

(Grants and allocations \$) If this amount includes foreign grants, check here ► ☐

215,582

f Total of Program Service Expenses (should equal line 44, column (B), Program services)

1,512,204

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Part IV Balance Sheets (See the instructions)**Note:** Where required, attached schedules and amounts within the description column should be for end-of-year amounts only

		(A) Beginning of year		(B) End of year
Assets	45 Cash—non-interest-bearing	439,869	45	502,114
	46 Savings and temporary cash investments	43,741	46	
	47a Accounts receivable	20,004		
	b Less allowance for doubtful accounts		47c	20,004
	48a Pledges receivable	17,030		
	b Less allowance for doubtful accounts		48c	17,030
	49 Grants receivable		49	
	50a Receivables from current and former officers, directors, trustees, and key employees (attach schedule)		50a	
	b Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) (att schedule)		50b	
	51a Other notes and loans receivable (attach schedule)			
	b Less allowance for doubtful accounts		51c	
	52 Inventories for sale or use		52	
	53 Prepaid expenses and deferred charges	1,067	53	8,202
	54a Investments—publicly-traded securities SEE STATEMENT 5	☐ Cost ☐ FMV	54a	220,108
	b Investments—other securities (attach schedule)	☐ Cost ☐ FMV	54b	
55a Investments—land, buildings, and equipment basis	2,615,881			
b Less accumulated depreciation (attach schedule) SEE STATEMENT 6	1,012,448	1,627,801	55c	1,603,433
56 Investments—other (attach schedule)		56		
57a Land, buildings, and equipment basis				
b Less accumulated depreciation (attach schedule)		57c		
58 Other assets, including program-related investments (describe ☐)		58		
59 Total assets (must equal line 74) Add lines 45 through 58	2,128,157	59	2,370,891	
Liabilities	60 Accounts payable and accrued expenses	16,332	60	17,084
	61 Grants payable		61	
	62 Deferred revenue SEE STATEMENT 7	306,784	62	380,396
	63 Loans from officers, directors, trustees, and key employees (attach schedule)		63	
	64a Tax-exempt bond liabilities (attach schedule)		64a	
	b Mortgages and other notes payable (attach schedule)		64b	
	65 Other liabilities (describe ☐ SEE STATEMENT 8)	1,892,794	65	1,885,343
66 Total liabilities. Add lines 60 through 65	2,215,910	66	2,282,823	
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here ☒ and complete lines 67 through 69 and lines 73 and 74			
	67 Unrestricted	-197,293	67	-235,115
	68 Temporarily restricted	109,540	68	323,183
	69 Permanently restricted		69	
	Organizations that do not follow SFAS 117, check here ☐ and complete lines 70 through 74			
	70 Capital stock, trust principal, or current funds		70	
	71 Paid-in or capital surplus, or land, building, and equipment fund		71	
	72 Retained earnings, endowment, accumulated income, or other funds		72	
	73 Total net assets or fund balances. Add lines 67 through 69 or lines 70 through 72 (Column (A) must equal line 19 and column (B) must equal line 21)	-87,753	73	88,068
	74 Total liabilities and net assets/fund balances. Add lines 66 and 73	2,128,157	74	2,370,891

Part IV-A

Reconciliation of Revenue per Audited Financial Statements With Revenue per Return (See the instructions.)

Part I. Revenue		2013											
a	Total revenue, gains, and other support per audited financial statements	a	2,267,733										
b	Amounts included on line a but not on Part I, line 12	<table border="1"> <tr><td>b1</td><td></td></tr> <tr><td>b2</td><td></td></tr> <tr><td>b3</td><td></td></tr> <tr><td></td><td></td></tr> <tr><td>b4</td><td></td></tr> </table>	b1		b2		b3				b4		
b1													
b2													
b3													
b4													
1	Net unrealized gains on investments												
2	Donated services and use of facilities												
3	Recoveries of prior year grants												
4	Other (specify)												
	Add lines b1 through b4	b											
c	Subtract line b from line a	c	2,267,733										
d	Amounts included on Part I, line 12, but not on line a :	<table border="1"> <tr><td>d1</td><td></td></tr> <tr><td></td><td></td></tr> <tr><td>d2</td><td></td></tr> </table>	d1				d2						
d1													
d2													
1	Investment expenses not included on Part I, line 6b												
2	Other (specify)												
	Add lines d1 and d2	d											
e	Total revenue (Part I, line 12) Add lines c and d	e	2,267,733										

Part IV-B

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

a	Total expenses and losses per audited financial statements		a	2,013,963
b	Amounts included on line a but not Part I, line 17			
1	Donated services and use of facilities	b1		
2	Prior year adjustments reported on Part I, line 20	b2		
3	Losses reported on Part I, line 20	b3		
4	Other (specify)	b4		
	Add lines b1 through b4		b	
c	Subtract line b from line a		c	2,013,963
d	Amounts included on Part I, line 17, but not on line a :			
1	Investment expenses not included on Part I, line 6b	d1		
2	Other (specify)	d2		
	SEE STATEMENT 9			
	Add lines d1 and d2		d	77,949
e	Total expenses (Part I, line 17) Add lines c and d		e	2,091,912

Part V-A

Current Officers, Directors, Trustees, and Key Employees (List each person who was an officer, director, trustee, or key employee at any time during the year even if they were not compensated) (See the instructions)

[illegible]

Part V-A **Current Officers, Directors, Trustees, and Key Employees (continued)**

Yes	No
-----	----

- 75a** Enter the total number of officers, directors, and trustees permitted to vote on organization business at board meetings ▶ 10
- b** Are any officers, directors, trustees, or key employees listed in Form 990, Part V-A, or highest compensated employees listed in Schedule A, Part I, or highest compensated professional and other independent contractors listed in Schedule A, Part II-A or II-B, related to each other through family or business relationships? If "Yes," attach a statement that identifies the individuals and explains the relationship(s)
- c** Do any officers, directors, trustees, or key employees listed in Form 990, Part V-A, or highest compensated employees listed in Schedule A, Part I, or highest compensated professional and other independent contractors listed in Schedule A, Part II-A or II-B, receive compensation from any other organizations, whether tax exempt or taxable, that are related to the organization? See the instructions for the definition of "related organization "
- If "Yes," attach a statement that includes the information described in the instructions
- d** Does the organization have a written conflict of interest policy?

75b		X
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75c	X
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75d	X
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Part V-B Former Officers, Directors, Trustees, and Key Employees That Received Compensation or Other Benefits

(If any former officer, director, trustee, or key employee received compensation or other benefits (described below) during the year, list that person below and enter the amount of compensation or other benefits in the appropriate column. See the instructions.)

[illegible]

Part VI Other Information (See the instructions)

Yes	No
-----	----

- 76** Did the organization make a change in its activities or methods of conducting activities? If "Yes," attach a detailed statement of each change
- 77** Were any changes made in the organizing or governing documents but not reported to the IRS? If "Yes," attach a conformed copy of the changes
- 78a** Did the organization have unrelated business gross income of \$1,000 or more during the year covered by this return?
- b** If "Yes," has it filed a tax return on **Form 990-T** for this year?
- 79** Was there a liquidation, dissolution, termination, or substantial contraction during the year? If "Yes," attach a statement
- 80a** Is the organization related (other than by association with a statewide or nationwide organization) through common membership, governing bodies, trustees, officers, etc., to any other exempt or nonexempt organization?
- b** If "Yes," enter the name of the organization  and check whether it is ☐ exempt
- 81a** Enter direct and indirect political expenditures (See line 81 instructions) 
- b** Did the organization file **Form 1120-POL** for this year?

76		X
----	--	---

77		X
----	--	---

78a		X
-----	--	---

78b		
-----	--	--

79		X
----	--	---

80a		X
-----	--	---

and check whether it is ☐ exempt or ☐ nonexempt

81a

0

81b	X
-----	---

Part VI Other Information (continued)

		Yes	No
82a	Did the organization receive donated services or the use of materials, equipment, or facilities at no charge or at substantially less than fair rental value?		X
b	If "Yes," you may indicate the value of these items here. Do not include this amount as revenue in Part I or as an expense in Part II. (See instructions in Part III.)		
	82b		
83a	Did the organization comply with the public inspection requirements for returns and exemption applications?	X	
b	Did the organization comply with the disclosure requirements relating to quid pro quo contributions?		
	N/A		
84a	Did the organization solicit any contributions or gifts that were not tax deductible?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
	N/A		
85a	501(c)(4), (5), or (6). Were substantially all dues nondeductible by members?		
	N/A		
b	Did the organization make only in-house lobbying expenditures of \$2,000 or less? If "Yes" was answered to either 85a or 85b, do not complete 85c through 85h below unless the organization received a waiver for proxy tax owed for the prior year.		
	N/A		
c	Dues, assessments, and similar amounts from members		
	85c		
d	Section 162(e) lobbying and political expenditures		
	85d		
e	Aggregate nondeductible amount of section 6033(e)(1)(A) dues notices		
	85e		
f	Taxable amount of lobbying and political expenditures (line 85d less 85e)		
	85f		
g	Does the organization elect to pay the section 6033(e) tax on the amount on line 85f?		
	N/A		
h	If section 6033(e)(1)(A) dues notices were sent, does the organization agree to add the amount on line 85f to its reasonable estimate of dues allocable to nondeductible lobbying and political expenditures for the following tax year?		
	N/A		
86	501(c)(7) orgs. Enter: a. Initiation fees and capital contributions included on line 12		
	86a		
b	Gross receipts, included on line 12, for public use of club facilities		
	86b		
87	501(c)(12) orgs. Enter: a. Gross income from members or shareholders		
	87a		
b	Gross income from other sources. (Do not net amounts due or paid to other sources against amounts due or received from them.)		
	87b		
88a	At any time during the year, did the organization own a 50% or greater interest in a taxable corporation or partnership, or an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? If "Yes," complete Part IX.		X
b	At any time during the year, did the organization, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Part XI.		X
89a	501(c)(3) organizations. Enter: Amount of tax imposed on the organization during the year under section 4911: 0 , section 4912: 0 , section 4955: 0		
b	501(c)(3) and 501(c)(4) orgs. Did the organization engage in any section 4958 excess benefit transaction during the year or did it become aware of an excess benefit transaction from a prior year? If "Yes," attach a statement explaining each transaction.		X
c	Enter: Amount of tax imposed on the organization managers or disqualified persons during the year under sections 4912, 4955, and 4958: 0		
d	Enter: Amount of tax on line 89c, above, reimbursed by the organization: 0		
e	All organizations. At any time during the tax year, was the organization a party to a prohibited tax shelter transaction?		X
f	All organizations. Did the organization acquire a direct or indirect interest in any applicable insurance contract?		X
g	For supporting organizations and sponsoring organizations maintaining donor advised funds. Did the supporting organization, or a fund maintained by a sponsoring organization, have excess business holdings at any time during the year?		X
90a	List the states with which a copy of this return is filed: NONE		
b	Number of employees employed in the pay period that includes March 12, 2007 (See instructions): 39		
91a	The books are in care of: TAXPAYER 280 SAM MCGEE ROAD Located at: ANDERSON, SC	Telephone no: 864-226-5344	
	ZIP + 4: 29621		
b	At any time during the calendar year, did the organization have an interest in or a signature or other authority over a financial account in a foreign country (such as a bank account, securities account, or other financial account)? If "Yes," enter the name of the foreign country: See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts		
	91b	Yes	No
			X

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Part VI Other Information (continued)

c At any time during the calendar year, did the organization maintain an office outside of the United States?

91c

Yes	No
	X

If "Yes," enter the name of the foreign country ▶

92 Section 4947(a)(1) nonexempt charitable trusts filing Form 990 in lieu of Form 1041—Check here

and enter the amount of tax-exempt interest received or accrued during the tax year ▶ 92

Part VII Analysis of Income-Producing Activities (See the instructions)

Note: Enter gross amounts unless otherwise indicated

	Unrelated business income		Excluded by section 512, 513, or 514		(E) Related or exempt function income
	(A) Business code	(B) Amount	(C) Exclusion code	(D) Amount	
93 Program service revenue					
a TUITION					1,557,705
b OTHER PROGRAM FEES					208,484
c MISCELLANEOUS FUNDRAISERS					213,476
d					
e					
f Medicare/Medicaid payments					
g Fees and contracts from government agencies					
94 Membership dues and assessments					
95 Interest on savings and temporary cash investments			14	16,663	
96 Dividends and interest from securities					
97 Net rental income or (loss) from real estate					
a debt-financed property					
b not debt-financed property					
98 Net rental income or (loss) from personal property					
99 Other investment income					
100 Gain or (loss) from sales of assets other than inventory					
101 Net income or (loss) from special events					
102 Gross profit or (loss) from sales of inventory					
103 Other revenue a					
b MISCELLANEOUS INCOME					1,545
c					
d					
e					
104 Subtotal (add columns (B), (D), and (E))		0		16,663	1,981,210
105 Total (add line 104, columns (B), (D), and (E))					1,997,873

Note: Line 105 plus line 1e, Part I, should equal the amount on line 12, Part I

Part VIII Relationship of Activities to the Accomplishment of Exempt Purposes (See the instructions)

Line No.	Explain how each activity for which income is reported in column (E) of Part VII contributed importantly to the accomplishment of the organization's exempt purposes (other than by providing funds for such purposes)
93A	FEES FOR SCHOOL TUITION, STUDENT LUNCHES, SUMMER CAMP, FIELD TRIPS, EXTENDED CARE TUITION, AND OTHER MISC SCHOOL PROGRAMS
101	INCOME FROM SCHOOL FUNDRAISING EVENTS

Part IX Information Regarding Taxable Subsidiaries and Disregarded Entities (See the instructions)

(A) Name, address, and EIN of corporation, partnership, or disregarded entity	(B) Percentage of ownership interest	(C) Nature of activities	(D) Total income	(E) End-of-year assets
N/A	%			
	%			
	%			
	%			

Part X Information Regarding Transfers Associated with Personal Benefit Contracts (See the instructions.)

(a) Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?

Yes	X	No
-----	---	----

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

Yes	X	No
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Note: If "Yes" to (b), file Form 8870 and Form 4720 (see instructions)

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Part XI Information Regarding Transfers To and From Controlled Entities. Complete only if the organization is a controlling organization as defined in section 512(b)(13)

106 Did the reporting organization make any transfers to a controlled entity as defined in section 512(b)(13) of the Code? If "Yes," complete the schedule below for each controlled entity

Yes	No
	X

	(A) Name, address, of each controlled entity	(B) Employer ID Number	(C) Description of transfer	(D) Amount of transfer
a				
b				
c				
	Totals			

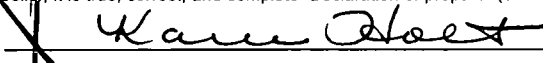
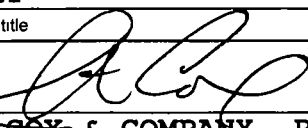
107 Did the reporting organization receive any transfers from a controlled entity as defined in section 512(b)(13) of the Code? If "Yes," complete the schedule below for each controlled entity

Yes	No
	X

	(A) Name, address, of each controlled entity	(B) Employer ID Number	(C) Description of transfer	(D) Amount of transfer
a				
b				
c				
	Totals			

108 Did the organization have a binding written contract in effect on August 17, 2006, covering the interest, rents, royalties, and annuities described in question 107 above?

Yes	No

Please 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 officer) is based on all information of which preparer has any knowledge.				
	 Signature of officer KAREN HOLT Type or print name and title		Date 9/29/10 EXECUTIVE DIRECTOR		
Paid Preparer's Use Only	Preparer's signature	 COX & COMPANY, PA, CPA'S Firm's name (or yours if self-employed), address, and ZIP + 4 2006 N MAIN ST ANDERSON, SC 29621-3869	Date 9/29/10	Check if self-employed ☐	Preparer's SSN or PTIN (See Gen Instr X) P00409494
				EIN 57-1124217 Phone no 864-225-8713	

Form 990 (2007)

SCHEDULE A
(Form 990 or 990-EZ)**Organization Exempt Under Section 501(c)(3)**(Except Private Foundation) and Section 501(e), 501(f), 501(k), 501(n),
or 4947(a)(1) Nonexempt Charitable Trust

OMB No 1545-0047

2007Department of the Treasury
Internal Revenue Service**Supplementary Information-(See separate instructions.)**▶ **MUST be completed by the above organizations and attached to their Form 990 or 990-EZ**

Name of the organization

MONTESSORI SCHOOL OF ANDERSON

Employer identification number

57-0570198

Part I Compensation of the Five Highest Paid Employees Other Than Officers, Directors, and Trustees
(See page 1 of the instructions. List each one. If there are 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 empl benefit plans & deferred comp	(e) Expense account and other allowances
NONE				

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

2

Part II-A Compensation of the Five Highest Paid Independent Contractors for Professional Services

(See page 2 of the instructions. List each one (whether individuals or firms). If there are none, enter "None")

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of others receiving over \$50,000 for
professional services ▶**Part II-B Compensation of the Five Highest Paid Independent Contractors for Other Services**

(List each contractor who performed services other than professional services, whether individuals or firms. If there are none, enter "None" See page 2 of the instructions)

(a) Name and address of each independent contractor paid more than \$50,000	(b) Type of service	(c) Compensation
NONE		

Total number of other contractors receiving over
\$50,000 for other services ▶

For Paperwork Reduction Act Notice, see the Instructions for Form 990 and Form 990-EZ

Schedule A (Form 990 or 990-EZ) 2007

Part III Statements About Activities (See page 2 of the instructions)

Yes	No
-----	----

1 During the year, has the organization attempted to influence national, state, or local legislation, including any attempt to influence public opinion on a legislative matter or referendum? If "Yes," enter the total expenses paid or incurred in connection with the lobbying activities ► \$ _____ (Must equal amounts on line 38, Part VI-A, or line i of Part VI-B)	1		X
Organizations that made an election under section 501(h) by filing Form 5768 must complete Part VI-A. Other organizations checking "Yes" must complete Part VI-B AND attach a statement giving a detailed description of the lobbying activities.			
2 During the year, has the organization, either directly or indirectly, engaged in any of the following acts with any substantial contributors, trustees, directors, officers, creators, key employees, or members of their families, or with any taxable organization with which any such person is affiliated as an officer, director, trustee, majority owner, or principal beneficiary? (If the answer to any question is "Yes," attach a detailed statement explaining the transactions)			
a Sale, exchange, or leasing of property?	2a		X
b Lending of money or other extension of credit?	2b		X
c Furnishing of goods, services, or facilities?	2c		X
d Payment of compensation (or payment or reimbursement of expenses if more than \$1,000)?	2d	X	
e Transfer of any part of its income or assets?	2e		X
3a Did the organization make grants for scholarships, fellowships, student loans, etc.? (If "Yes," attach an explanation of how the organization determines that recipients qualify to receive payments)	3a	X	
b Did the organization have a section 403(b) annuity plan for its employees?	3b	X	
c Did the organization receive or hold an easement for conservation purposes, including easements to preserve open space, the environment, historic land areas or historic structures? If "Yes," attach a detailed statement	3c		X
d Did the organization provide credit counseling, debt management, credit repair, or debt negotiation services?	3d		X
4a Did the organization maintain any donor advised funds? If "Yes," complete lines 4b through 4g. If "No," complete lines 4f and 4g	4a		X
b Did the organization make any taxable distributions under section 4966?	4b		
c Did the organization make a distribution to a donor, donor advisor, or related person?	4c		
d Enter the total number of donor advised funds owned at the end of the tax year			
e Enter the aggregate value of assets held in all donor advised funds owned at the end of the tax year			
f Enter the total number of separate funds or accounts owned at the end of the tax year (excluding donor advised funds included on line 4d) where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts			0
g Enter the aggregate value of assets held in all funds or accounts included on line 4f at the end of the tax year			0

Part IV Reason for Non-Private Foundation Status (See pages 4 through 8 of the instructions.)I certify that the organization is not a private foundation because it is (Please check only **ONE** applicable box.)

- 5 ☐ A church, convention of churches, or association of churches Section 170(b)(1)(A)(i)
- 6 ☒ A school Section 170(b)(1)(A)(ii) (Also complete Part V.)
- 7 ☐ A hospital or a cooperative hospital service organization Section 170(b)(1)(A)(iii)
- 8 ☐ A federal, state, or local government or governmental unit Section 170(b)(1)(A)(v)
- 9 ☐ A medical research organization operated in conjunction with a hospital Section 170(b)(1)(A)(iii) Enter the hospital's name, city, and state ►
- 10 ☐ An organization operated for the benefit of a college or university owned or operated by a governmental unit Section 170(b)(1)(A)(iv) (Also complete the **Support Schedule** in Part IV-A.)
- 11a ☐ An organization that normally receives a substantial part of its support from a governmental unit or from the general public Section 170(b)(1)(A)(vi) (Also complete the **Support Schedule** in Part IV-A.)
- 11b ☐ A community trust Section 170(b)(1)(A)(vi) (Also complete the **Support Schedule** in Part IV-A.)
- 12 ☐ An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its charitable, etc., functions-subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See section 509(a)(2) (Also complete the **Support Schedule** in Part IV-A.)
- 13 ☐ An organization that is not controlled by any disqualified persons (other than foundation managers) and otherwise meets the requirements of section 509(a)(3) Check the box that describes the type of supporting organization
- ☐ Type I ☐ Type II ☐ Type III-Functionally Integrated ☐ Type III-Other

Provide the following information about the supported organizations (See page 8 of the instructions.)

(a) Name(s) of supported organization(s)	(b) Employer identification number (EIN)	(c) Type of organization (described in lines 5 through 12 above or IRC section)	(d) Is the supported organization listed in the supporting organization's governing documents?		(e) Amount of support
			Yes	No	
Total ►					

- 14 ☐ An organization organized and operated to test for public safety Section 509(a)(4) (See page 8 of the instructions.)

Part IV-A Support Schedule (Complete only if you checked a box on line 10, 11, or 12) Use cash method of accounting.**Note:** You may use the worksheet in the instructions for converting from the accrual to the cash method of accounting

Calendar year (or fiscal year beginning in) ▶	(a) 2006	(b) 2005	(c) 2004	(d) 2003	(e) Total
15 Gifts, grants, and contributions received (Do not include unusual grants See line 28)					
16 Membership fees received					
17 Gross receipts from admissions, merchandise sold or services performed, or furnishing of facilities in any activity that is related to the organization's charitable, etc., purpose					
18 Gross income from interest, dividends, amounts received from payments on securities loans (section 512(a)(5)), rents, royalties, income from similar sources, and unrelated business taxable income (less section 511 taxes) from businesses acquired by the organization after June 30, 1975					
19 Net income from unrelated business activities not included in line 18					
20 Tax revenues levied for the organization's benefit and either paid to it or expended on its behalf					
21 The value of services or facilities furnished to the organization by a governmental unit without charge Do not include the value of services or facilities generally furnished to the public without charge					
22 Other income Attach a schedule Do not include gain or (loss) from sale of capital assets					
23 Total of lines 15 through 22					
24 Line 23 minus line 17					
25 Enter 1% of line 23					

26 Organizations described on lines 10 or 11: a Enter 2% of amount in column (e), line 24 ▶ **26a** _____

b Prepare a list for your records to show the name of and amount contributed by each person (other than a governmental unit or publicly supported organization) whose total gifts for 2003 through 2006 exceeded the amount shown in line 26a Do not file this list with your return. Enter the total of all these excess amounts ▶ **26b** _____

c Total support for section 509(a)(1) test Enter line 24, column (e) ▶ **26c** _____

d Add Amounts from column (e) for lines 18 _____ 19 _____
22 _____ 26b _____ ▶ **26d** _____

e Public support (line 26c minus line 26d total) ▶ **26e** _____

f Public support percentage (line 26e (numerator) divided by line 26c (denominator)) ▶ **26f** _____ %

27 Organizations described on line 12: a For amounts included in lines 15, 16, and 17 that were received from a "disqualified person," prepare a list for your records to show the name of, and total amounts received in each year from, each "disqualified person" Do not file this list with your return. Enter the sum of such amounts for each year

(2006)	(2005)	(2004)	(2003)		
b For any amount included in line 17 that was received from each person (other than "disqualified persons"), prepare a list for your records to show the name of, and amount received for each year, that was more than the larger of (1) the amount on line 25 for the year or (2) \$5,000 (Include in the list organizations described in lines 5 through 11b, as well as individuals) Do not file this list with your return. After computing the difference between the amount received and the larger amount described in (1) or (2), enter the sum of these differences (the excess amounts) for each year	(2006)	(2005)	(2004)	(2003)	
c Add Amounts from column (e) for lines 15 _____ 16 _____ 17 _____ 20 _____ 21 _____					▶ 27c _____
d Add Line 27a total _____ and line 27b total _____					▶ 27d _____
e Public support (line 27c total minus line 27d total)					▶ 27e _____
f Total support for section 509(a)(2) test Enter amount from line 23, column (e) ▶ 27f _____					
g Public support percentage (line 27e (numerator) divided by line 27f (denominator))					▶ 27g _____ %
h Investment income percentage (line 18, column (e) (numerator) divided by line 27f (denominator))					▶ 27h _____ %

28 Unusual Grants: For an organization described in line 10, 11, or 12 that received any unusual grants during 2003 through 2006, prepare a list for your records to show, for each year, the name of the contributor, the date and amount of the grant, and a brief description of the nature of the grant Do not file this list with your return Do not include these grants in line 15

Part V Private School Questionnaire (See page 9 of the instructions)(To be completed **ONLY** by schools that checked the box on line 6 in Part IV)

	Yes	No
29 Does the organization have a racially nondiscriminatory policy toward students by statement in its charter, bylaws, other governing instrument, or in a resolution of its governing body?	X	
30 Does the organization include a statement of its racially nondiscriminatory policy toward students in all its brochures, catalogues, and other written communications with the public dealing with student admissions, programs, and scholarships?	X	
31 Has the organization publicized its racially nondiscriminatory policy through newspaper or broadcast media during the period of solicitation for students, or during the registration period if it has no solicitation program, in a way that makes the policy known to all parts of the general community it serves? If "Yes," please describe, if "No," please explain (If you need more space, attach a separate statement) POLICY IS AVAILABLE AT ANNUAL MEETING OPEN TO COMMUNITY.	X	
32 Does the organization maintain the following		
a Records indicating the racial composition of the student body, faculty, and administrative staff?	X	
b Records documenting that scholarships and other financial assistance are awarded on a racially nondiscriminatory basis?	X	
c Copies of all catalogues, brochures, announcements, and other written communications to the public dealing with student admissions, programs, and scholarships?	X	
d Copies of all material used by the organization or on its behalf to solicit contributions?	X	
If you answered "No" to any of the above, please explain (If you need more space, attach a separate statement)		
33 Does the organization discriminate by race in any way with respect to		
a Students' rights or privileges?		X
b Admissions policies?		X
c Employment of faculty or administrative staff?		X
d Scholarships or other financial assistance?		X
e Educational policies?		X
f Use of facilities?		X
g Athletic programs?		X
h Other extracurricular activities?		X
If you answered "Yes" to any of the above, please explain (If you need more space, attach a separate statement)		
34a Does the organization receive any financial aid or assistance from a governmental agency?		X
b Has the organization's right to such aid ever been revoked or suspended? If you answered "Yes" to either 34a or b, please explain using an attached statement		X
35 Does the organization certify that it has complied with the applicable requirements of sections 4 01 through 4 05 of Rev Proc 75-50, 1975-2 C B 587, covering racial nondiscrimination? If "No," attach an explanation	X	

Part VI-A Lobbying Expenditures by Electing Public Charities (See page 11 of the instructions.)(To be completed **ONLY** by an eligible organization that filed Form 5768) **N/A**

Check ☐	a	if the organization belongs to an affiliated group	Check ☐	b	if you checked "a" and "limited control" provisions apply
---------------------------------------	----------	--	---------------------------------------	----------	---

Limits on Lobbying Expenditures		(a) Affiliated group totals	(b) To be completed for all electing organizations												
(The term "expenditures" means amounts paid or incurred.)															
36 Total lobbying expenditures to influence public opinion (grassroots lobbying)	36														
37 Total lobbying expenditures to influence a legislative body (direct lobbying)	37														
38 Total lobbying expenditures (add lines 36 and 37)	38														
39 Other exempt purpose expenditures	39														
40 Total exempt purpose expenditures (add lines 38 and 39)	40														
41 Lobbying nontaxable amount. Enter the amount from the following table-															
<table style="width:100%; border: none;"> <tr> <td style="width:50%;">If the amount on line 40 is-</td> <td style="width:50%;">The lobbying nontaxable amount is-</td> </tr> <tr> <td>Not over \$500,000</td> <td>20% of the amount on line 40</td> </tr> <tr> <td>Over \$500,000 but not over \$1,000,000</td> <td>\$100,000 plus 15% of the excess over \$500,000</td> </tr> <tr> <td>Over \$1,000,000 but not over \$1,500,000</td> <td>\$175,000 plus 10% of the excess over \$1,000,000</td> </tr> <tr> <td>Over \$1,500,000 but not over \$17,000,000</td> <td>\$225,000 plus 5% of the excess over \$1,500,000</td> </tr> <tr> <td>Over \$17,000,000</td> <td>\$1,000,000</td> </tr> </table>	If the amount on line 40 is-	The lobbying nontaxable amount is-	Not over \$500,000	20% of the amount on line 40	Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000	Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000	Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000	Over \$17,000,000	\$1,000,000			
If the amount on line 40 is-	The lobbying nontaxable amount is-														
Not over \$500,000	20% of the amount on line 40														
Over \$500,000 but not over \$1,000,000	\$100,000 plus 15% of the excess over \$500,000														
Over \$1,000,000 but not over \$1,500,000	\$175,000 plus 10% of the excess over \$1,000,000														
Over \$1,500,000 but not over \$17,000,000	\$225,000 plus 5% of the excess over \$1,500,000														
Over \$17,000,000	\$1,000,000														
42 Grassroots nontaxable amount (enter 25% of line 41)	42														
43 Subtract line 42 from line 36. Enter -0- if line 42 is more than line 36	43														
44 Subtract line 41 from line 38. Enter -0- if line 41 is more than line 38	44														

Caution: If there is an amount on either line 43 or line 44, you must file Form 4720.**4-Year Averaging Period Under Section 501(h)**

(Some organizations that made a section 501(h) election do not have to complete all of the five columns below.)

See the instructions for lines 45 through 50 on page 13 of the instructions.)

Calendar year (or fiscal year beginning in) ▶	Lobbying Expenditures During 4-Year Averaging Period				
	(a) 2007	(b) 2006	(c) 2005	(d) 2004	(e) Total
45 Lobbying nontaxable amount					
46 Lobbying ceiling amount (150% of line 45(e))					
47 Total lobbying expenditures					
48 Grassroots nontaxable amount					
49 Grassroots ceiling amount (150% of line 48(e))					
50 Grassroots lobbying expenditures					

Part VI-B Lobbying Activity by Nonelecting Public Charities(For reporting only by organizations that did not complete Part VI-A) (See page 14 of the instructions.) **N/A**

During the year, did the organization attempt to influence national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of

- a** Volunteers
- b** Paid staff or management (Include compensation in expenses reported on lines c through h.)
- c** Media advertisements
- d** Mailings to members, legislators, or the public
- e** Publications, or published or broadcast statements
- f** Grants to other organizations for lobbying purposes
- g** Direct contact with legislators, their staffs, government officials, or a legislative body
- h** Rallies, demonstrations, seminars, conventions, speeches, lectures, or any other means
- i** Total lobbying expenditures (Add lines c through h.)

If "Yes" to any of the above, also attach a statement giving a detailed description of the lobbying activities.

Yes	No	Amount

Federal Statements

57-0570198

FYE: 7/31/2008

Statement 1 - Form 990, Part II, Line 25a - Compensation of Current Officers

Name	Program Services	Management & General	Fundraising
EXPENSES	\$	\$	\$
COMPENSATION	26,500	50,000	
TOTAL	\$ 26,500	\$ 50,000	\$ 0

57-0570198

Federal Statements

FYE: 7/31/2008

Statement 2 - Form 990, Part II, Line 43 - Other Functional Expenses

Description	Total Expenses	Program Service	Mgt & General	Fund- Raising
EXPENSES	\$	\$	\$	\$
BAD DEBTS	9,017		9,017	
BANK CHARGES				
BUS EXPENSE				
CLEANING				
CONTINUING EDUCATION				
DUES & SUBSCRIPTIONS				
EMPLOYEE DISCOUNTS				
EMPLOYEE MEDICAL INSURANCE				
EXTENDED DAY CARE EXPENSE				
FIELD TRIP EXPENSES	21,825	21,825		
INSURANCE	22,868	16,500	6,368	
LICENSING EXPENSE				
MISCELLANEOUS				
MISCELLANEOUS FURNISHINGS				
MULTICILD DISCOUNTS				
OTHER	5,917		5,917	
PAYMENT SCHEDULE DISCOUNTS				
PENSION PLAN EXPENSE				
PROFESSIONAL FEES	18,206	5,999	12,207	
PUBLIC RELATIONS	16,835		16,835	
SCHOLARSHIPS				
SUMMER PROGRAM				
UTILITIES	55,559	40,088	15,471	
TOTAL	\$ 150,227	\$ 84,412	\$ 65,815	\$ 0

Federal Statements**Statement 3 - Form 990, Part III - Organization's Primary Exempt Purpose****Description**

MONTESSORI SCHOOL OF ANDERSON CONSISTS OF APPROX 215 STUDENTS RANGING IN AGE FROM SIX WEEKS OLD THROUGH 12TH GRADE. THE SCHOOL IS DIVIDED INTO FIVE SECTIONS: INFANT/TODDLER, PRESCHOOL, ELEMENTARY, MIDDLE SCHOOL, AND HIGH SCHOOL. THE MONTESSORI SCHOOL REPRESENTS THE BEST OF EDUCATIONAL INNOVATION WITH ITS GOALS FIRMLY ROOTED IN THE MONTESSORI PHILOSOPHY. IT MAINTAINS HIGH MORAL STANDARDS THAT PROMOTE CONCEPTS SUCH AS SELF-DISCIPLINE, SELF-EVALUATION, SKILLS OF CONFLICT RESOLUTION, COOPERATION INSTEAD OF HEAVY COMPETITION, AND ACADEMIC EXCELLENCE. THE MONTESSORI SCHOOL OF ANDERSON HAS BEEN IN EXISTENCE FOR THIRTY YEARS AND HAS CONSISTENTLY OPERATED AS A NONPROFIT, TAX-EXEMPT ORGANIZATION ACCEPTING CHILDREN WITH ALL RELIGIOUS AND ETHNIC BACKGROUNDS. IT ALSO ACCEPTS CHILDREN WITH VARIOUS MILD TO MODERATE PHYSICAL, MENTAL, AND EMOTIONAL HANDICAPS. IT IS GOVERNED BY A THIRTEEN MEMBER BOARD OF TRUSTEES, AND IS ADMINISTERED BY AN OFFICE STAFF OF SEVEN. AN ADDITIONAL FULL TIME TEACHING/CARE-GIVING STAFF OF FORTY-FOUR IMPROVES THE REST OF THE PROGRAM. SCHOLARSHIPS, DERIVED FROM VARIOUS FUNDRAISING EFFORTS ON THE PART OF THE GENERAL PARENT BODY, ARE OFFERED EACH YEAR TO FAMILIES NEEDING ASSISTANCE. CRITERIA FOR SELECTION IS BASED ON OVERALL FINANCIAL NEED AND NUMBER OF CHILDREN ENROLLED IN THE PROGRAM. NOTICE OF THE SCHOLARSHIP PROGRAM IS POSTED IN THE SPRING EACH YEAR AND APPLICATIONS ARE GIVEN TO ALL WHO REQUEST ONE. A COMMITTEE DISTRIBUTES SCHOLARSHIP MONIES AFTER REVIEWING THE APPLICATIONS. IN ADDITION, THERE ARE MANY OPPORTUNITIES FOR FAMILIES TO WORK AT SCHOOL, THUS PROVIDING AVENUES TO EARN EXTRA INCOME FOR THE PURPOSE OF OFFSETTING TUITION COSTS.

Statement 4 - Form 990, Part III, Line e - Other Program Services**Description**

INSTRUCTION AND STUDENT ACTIVITIES - SEE ATTACHED STATEMENT

57-0570198

Federal Statements

FYE: 7/31/2008

Statement 5 - Form 990, Part IV, Line 54a - Publicly Traded Securities

Description	Beginning of Year	End of Year	Basis of Valuation
CORPORATE STOCK	\$	\$	
		220,108	
TOTAL	\$ 0	\$ 220,108	

Statement 6 - Form 990, Part IV, Line 55 - Investments in Land, Buildings, and Equipment

Description	Beginning of Year	Accum Depr	End of Year	Accum Depr
	\$ 2,562,300	\$ 934,499	\$ 2,615,881	\$ 1,012,448
TOTAL	\$ 2,562,300	\$ 934,499	\$ 2,615,881	\$ 1,012,448

Statement 7 - Form 990, Part IV, Line 62 - Deferred Revenue

Description	Beginning of Year	End of Year
DEFERRED REVENUE	\$ 306,784	\$ 380,396
TOTAL	\$ 306,784	\$ 380,396

Statement 8 - Form 990, Part IV, Line 65 - Other Liabilities

Description	Beginning of Year	End of Year
NOTES PAYABLE	\$ 1,151,155	\$ 1,716,397
ACCRUED PAYROLL	21,110	45,357
COMPENSATED ABSENCES	65,909	79,153
CURRENT PORTION OF DEBT	41,420	44,436
TOTAL	\$ 1,892,794	\$ 1,885,343

'57-0570198'

Federal Statements

FYE: 7/31/2008

Statement 9 - Form 990, Part IV-B - Other Expenses included on Return

Description	Amount
BOOK / TAX DEPREC DIFFERENCE	\$ 77,949
TOTAL	\$ 77,949

Federal Statements

9/29/2010 8:07 AM

Statement 10 - Form 990, Part V-A - List of Officers, Directors, Trustees, and Key Employees

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
KAREN HOLT 4505 MIDWAY ROAD WILLIAMSTON SC 29697	PRESIDENT	40	76,500	3,657	0
DANA HILL 1003 E. CALHOUN STREET ANDERSON SC 29621	VICE CHAIRMA	1	0	0	0
JENNY MCALISTER 114 FIELDSTONE WAY ANDERSON SC 29621	TREASURER	1	0	0	0
BRUCE NORD 1004 THORNEHILL DRIVE ANDERSON SC 29621	BOARD MEMBER	1	0	0	0
CT CROWER P.O. BOX 1447 ANDERSON SC 29622	BOARD MEMBER	1	0	0	0
KARON VEEHAN 1301 FIVE FORKS RD ANDERSON SC 29621	BOARD MEMBER	1	0	0	0
JOHN GUIDERA 314 SHORECREST DRIVE SENECA SC 29672	BOARD MEMBER	1	0	0	0
DAVID RODGERS 1016 WATERFORD CT ANDERSON SC 29621	BOARD MEMBER	1	0	0	0
BRIAN MERRIMAN 2802 RAMBLING PATH ANDERSON SC 29621	BOARD MEMBER	1	0	0	0

Federal Statements

9/29/2010 8:07 AM

57-0570198

FYE: 7/31/2008

Statement 10 - Form 990, Part V-A - List of Officers, Directors, Trustees, and KeyEmployees (continued)

Name and Address	Title	Average Hours	Compensation	Benefits	Expenses
DAN WALDSMITH 4075 SIX AND TWENTY ROAD WILLIAMSTON SC 29697	BOARD MEMBER	1	0	0	0
MATT OTTO SUNDERMAN 401 JIM GARRETT ROAD BELTON SC 29627	BOARD MEMBER	1	0	0	0
JOHN STATHAKIS 404 BOULEVARD ANDERSON SC 29621	CHAIRMAN	1	0	0	0
		0	0	0	0

'57-0570198'

Federal Statements

FYE: 7/31/2008

Statement 11 - Schedule A, Part III, Line 3a - Explanation of Grant/Loan QualificationsDescription

STUDENTS SELECTED TO RECEIVE SCHOLARSHIPS ARE DETERMINED ON A FINANCIAL
NEED BASIS.

'57-0570198'

Federal Statements

FYE: 7/31/2008

Schedule A, Part V, Line 31 - Publication of Nondiscriminatory PolicyDescription

POLICY IS AVAILABLE AT ANNUAL MEETING OPEN TO COMMUNITY.

Forms 990 / 990-EZ Return SummaryFor calendar year 2007, or tax year beginning **8/01/07**, and ending **7/31/08****57-0570198****MONTESSORI SCHOOL OF ANDERSON****Net Asset / Fund Balance at Beginning of Year****-87,753****Revenue**

Contributions	<u>269,860</u>
Program service revenue	<u>1,979,665</u>
Investment income	<u>16,663</u>
Capital gain / loss	<u></u>
Special events	<u></u>
Gross revenue	<u></u>
Direct expenses	<u></u>
Net income	<u>1,545</u>
Other income	<u></u>
Total revenue	<u>2,267,733</u>

Expenses

Program services	<u>1,512,204</u>
Management and general	<u>383,105</u>
Fundraising	<u>196,603</u>
Payments to affiliates	<u></u>
Total expenses	<u>2,091,912</u>

Excess / (deficit)**175,821**Other changes **Net Asset / Fund Balance at End of Year****88,068****Reconciliation of Revenue**

Total revenue per financial statements	<u>2,267,733</u>
Less	
Unrealized gains	<u></u>
Donated services	<u></u>
Recoveries	<u></u>
Other	<u></u>
Plus	
Investment expenses	<u></u>
Other	<u></u>
Total revenue per return	<u>2,267,733</u>

Reconciliation of Expenses

Total expenses per financial statements	<u>2,013,963</u>
Less	
Donated services	<u></u>
Prior year adjustments	<u></u>
Losses	<u></u>
Other	<u></u>
Plus	
Investment expenses	<u></u>
Other	<u></u>
Total expenses per return	<u>2,091,912</u>

Balance Sheet

	Beginning	Ending	Differences
Assets	<u>2,128,157</u>	<u>2,370,891</u>	
Liabilities	<u>2,215,910</u>	<u>2,282,823</u>	
Net assets	<u>-87,753</u>	<u>88,068</u>	<u>175,821</u>

Miscellaneous InformationAmended return Return / extended due date **3/16/09**Failure to file penalty