Form **990-PF**

Department of the Treasury
Internal Revenue Service

Return of Private Foundation
or Section 4947(a)(1) Nonexempt Charitable Trust Treated as a Private Foundation

Note. The foundation may be able to use a copy of this return to satisfy state reporting requirements.

OMB No 1545-0052

2009

For calendar year 2009, or tax year beginning , *and ending*

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

Use the IRS label. Otherwise, print or type. See Specific Instructions.

Name of foundation
EDUCATIONAL ADVANCEMENT FOUNDATION

Number and street (or P O box number if mail is not delivered to street address) | Room/suite
2303 RIO GRANDE STREET

City or town, state, and ZIP code
AUSTIN, TX 78705

A Employer identification number
23-7001761

B Telephone number
512-469-1700

C If exemption application is pending, check here ▶ ☐

D 1. Foreign organizations, check here ▶ ☐
2. Foreign organizations meeting the 85% test, check here and attach computation ▶ ☐

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

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

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

I Fair market value of all assets at end of year *(from Part II, col (c), line 16)* ▶$ 988,809.

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

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	210,564.		N/A	
	2	Check ▶ ☐ if the foundation is not required to attach Sch B				
	3	Interest on savings and temporary cash investments	11,105.	11,105.		STATEMENT 1
	4	Dividends and interest from securities	18,655.	18,648.		STATEMENT 2
	5a	Gross rents				
	b	Net rental income or (loss)				
	6a	Net gain or (loss) from sale of assets not on line 10	49,445.			
	b	Gross sales price for all assets on line 6a 1,332,811.				
	7	Capital gain net income (from Part IV, line 2)		49,445.		
	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	2,415.	2,415.		STATEMENT 3
	12	**Total** Add lines 1 through 11	292,184.	81,613.		
Operating and Administrative Expenses	13	Compensation of officers, directors, trustees, etc	6,000.	3,000.		3,000.
	14	Other employee salaries and wages				
	15	Pension plans, employee benefits				
	16a	Legal fees STMT 4	10,417.	0.		10,417.
	b	Accounting fees STMT 5	12,143.	6,071.		6,072.
	c	Other professional fees STMT 6	79,917.	7,567.		72,350.
	17	Interest				
	18	Taxes STMT 7	252.	159.		93.
	19	Depreciation and depletion	196.	0.		
	20	Occupancy				
	21	Travel, conferences, and meetings	117,939.	0.		117,939.
	22	Printing and publications	3,907.	0.		3,907.
	23	Other expenses STMT 8	125,617.	20,978.		104,669.
	24	**Total operating and administrative expenses.** Add lines 13 through 23	356,388.	37,775.		318,447.
	25	Contributions, gifts, grants paid	537,169.			537,169.
	26	**Total expenses and disbursements.** Add lines 24 and 25	893,557.	37,775.		855,616.
	27	Subtract line 26 from line 12:				
	a	Excess of revenue over expenses and disbursements	<601,373.>			
	b	**Net investment income** (if negative, enter -0-)		43,838.		
	c	**Adjusted net income** (if negative, enter -0-)			N/A	

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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	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing	148,022.	10,497.	10,497.
	2 Savings and temporary cash investments	8,309.	409,419.	409,419.
	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			
	c Investments - corporate bonds			
	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other STMT 9	1,429,060.	564,298.	568,550.
	14 Land, buildings, and equipment: basis ▶ 4,675.			
	Less accumulated depreciation STMT 10▶ 4,332.	539.	343.	343.
	15 Other assets (describe ▶)			
	16 **Total assets** (to be completed by all filers)	1,585,930.	984,557.	988,809.
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	1,585,930.	984,557.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ ☐ **and complete lines 27 through 31.**			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg., and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances**	1,585,930.	984,557.	
	31 **Total liabilities and net assets/fund balances**	1,585,930.	984,557.	

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	1,585,930.
2	Enter amount from Part I, line 27a	2	<601,373.>
3	Other increases not included in line 2 (itemize) ▶	3	0.
4	Add lines 1, 2, and 3	4	984,557.
5	Decreases not included in line 2 (itemize) ▶	5	0.
6	Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	984,557.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.)	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b	SEE ATTACHED STATEMENT			
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				
b				
c				
d				
e	1,332,811.		1,283,366.	49,445.

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

	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	(l) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))
a				
b				
c				
d				
e				49,445.

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 49,445.

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6):
If gain, also enter in Part I, line 8, column (c).
If (loss), enter -0- in Part I, line 8 } 3 N/A

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

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

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

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

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

1 Enter the appropriate amount in each column for each year; see 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))
2008	647,415.	632,492.	1.023594
2007	748,686.	1,038,518.	.720918
2006	502,369.	1,127,013.	.445753
2005	579,331.	1,024,864.	.565276
2004	1,327,658.	1,096,706.	1.210587

2	**Total** of line 1, column (d)	2	3.966128
3	Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	.793226
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	1,041,922.
5	Multiply line 4 by line 3	5	826,480.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	438.
7	Add lines 5 and 6	7	826,918.
8	Enter qualifying distributions from Part XII, line 4	8	855,616.

If line 8 is equal to or greater than line 7, check the box in Part VI, line 1b, and complete that part using a 1% tax rate. See the Part VI instructions.

Part VI Excise Tax Based on Investment Income (Section 4940(a), 4940(b), 4940(e), or 4948 - see instructions)

1a Exempt operating foundations described in section 4940(d)(2), check here ▶ ☐ and enter "N/A" on line 1. Date of ruling or determination letter: ______ **(attach copy of letter if necessary-see instructions)** **b** Domestic foundations that meet the section 4940(e) requirements in Part V, check here ▶ ☒ and enter 1% of Part I, line 27b **c** All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)			1	438.
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	438.
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	438.
6 Credits/Payments:				
a 2009 estimated tax payments and 2008 overpayment credited to 2009	6a			
b Exempt foreign organizations - tax withheld at source	6b			
c Tax paid with application for extension of time to file (Form 8868)	6c			
d Backup withholding erroneously withheld	6d			
7 Total credits and payments. Add lines 6a through 6d			7	0.
8 Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached			8	
9 **Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ▶			9	438.
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ▶			10	
11 Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ▶		**Refunded** ▶	11	

Part VII-A Statements Regarding Activities

		Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see instructions for definition)?	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) ▶ TX			
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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? *If "Yes," complete Part XIV*	9		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses STMT 11	10	X	

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

11 At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12 Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13 Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	

Website address ▶ EDUCATIONALADVANCEMENTFOUNDATION.ORG

14 The books are in care of ▶ FAIN BROCK Telephone no. ▶ 512-469-1700

Located at ▶ 2303 RIO GRANDE ST, AUSTIN, TX ZIP+4 ▶ 78705

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

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 page 20 of the 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 2009?		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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009?	☐ 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 2009 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 2009.)*	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 2009?		4b		X

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

5a During the year did the foundation pay or incur any amount to:

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))? ☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955); or to carry on, directly or indirectly, any voter registration drive? ☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes? ☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)? ☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals? ☐ Yes ☒ No

b If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)? N/A | 5b | |

Organizations relying on a current notice regarding disaster assistance check here ▶ ☐

c If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant? N/A ☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53 4945-5(d).

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? | 6b | | X

If "Yes" to 6b, file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction? ☐ Yes ☒ No

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

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

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 12		5,000.	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 SUPPORT FOR 11TH ANNUAL LEGACY OF R.L. MOORE CONFERENCE - TX ATTENDED BY 220 EDUCATORS AND GRADUATE STUDENTS DEVOTED TO FOSTERING THE MOORE METHOD AND INQUIRY-BASED LEARNING	48,287.
2 JOINT MATHEMATICS MEETING - SAN DIEGO - ATTENDED BY 4,500 MATHEMATICIANS. FOUNDATION HOSTS ROUNDTABLE DISCUSSIONS AND OTHER EDUCATION FORUMS TO SHARE MOORE METHOD	66,923.
3 EDUCATIONAL OUTREACH - SPEAKING AND MENTORING ACTIVITIES AT VARIOUS EDUCATIONAL INSTITUTIONS TO PROMOTE INQUIRY-BASED LEARNING INSPIRED BY DR. R.L. MOORE	22,099.
4 CENTER SUPPORT - SPEAKING AND MARKETING ACTIVITIES TO GENERATE SUPPORT FOR THE 5 UNIVERSITY CENTERS THAT TEACH AND CONDUCT RESEARCH UTILITIZING MOORE LEARNING METHOD	27,359.

Part IX-B Summary of Program-Related Investments

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:			
a	Average monthly fair market value of securities		1a	796,471.
b	Average of monthly cash balances		1b	198,818.
c	Fair market value of all other assets		1c	62,500.
d	**Total** (add lines 1a, b, and c)		1d	1,057,789.
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	1,057,789.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)		4	15,867.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	1,041,922.
6	**Minimum investment return.** Enter 5% of line 5		6	52,096.

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	52,096.
2a	Tax on investment income for 2009 from Part VI, line 5	2a 438.		
b	Income tax for 2009. (This does not include the tax from Part VI.)	2b		
c	Add lines 2a and 2b		2c	438.
3	Distributable amount before adjustments. Subtract line 2c from line 1		3	51,658.
4	Recoveries of amounts treated as qualifying distributions		4	0.
5	Add lines 3 and 4		5	51,658.
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	51,658.

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	855,616.
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	855,616.
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	438.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	855,178.

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 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				51,658.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years: ______ , ______ , ______		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004 1,259,808.				
b From 2005 528,356.				
c From 2006 446,821.				
d From 2007 699,446.				
e From 2008 615,790.				
f **Total** of lines 3a through e	3,550,221.			
4 Qualifying distributions for 2009 from Part XII, line 4: ▶ $ 855,616.				
a Applied to 2008, 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 2009 distributable amount				51,658.
e Remaining amount distributed out of corpus	803,958.			
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5	4,354,179.			
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 2008. Subtract line 4a from line 2a. Taxable amount - see instr.			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7	1,259,808.			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	3,094,371.			
10 Analysis of line 9:				
a Excess from 2005 528,356.				
b Excess from 2006 446,821.				
c Excess from 2007 699,446.				
d Excess from 2008 615,790.				
e Excess from 2009 803,958.				

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 2009, 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) 2009	(b) 2008	(c) 2007	(d) 2006	(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 the instructions.)**

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

NONE

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

NONE

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc., Programs:**

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc. (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d.

a The name, address, and telephone number of the person to whom applications should be addressed:

SEE STATEMENT 13

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 B				537,169.
Total			▶ 3a	537,169.
b *Approved for future payment* NONE				
Total			▶ 3b	0.

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
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			14	11,105.	
4 Dividends and interest from securities			14	18,655.	
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			15	2,415.	
8 Gain or (loss) from sales of assets other than inventory			18	49,445.	
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.		81,620.	0.

13 Total. Add line 12, columns (b), (d), and (e) 13 81,620.

(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).

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

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

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

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

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

b If "Yes," complete the following schedule.

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

Sign Here

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete Declaration of preparer (other than taxpayer or fiduciary) is based on all information of which preparer has any knowledge

▶ Dan mock | 5/4/2010 ▶

Signature of officer or trustee | Date | Title

Paid Preparer's Use Only

Preparer's signature ▶ Michael A | Date 4/3/2010 | Check if self-employed ▶ ☐ | Preparer's identifying number

Firm's name (or yours if self-employed), address, and ZIP code ▶ MOHLE ADAMS
3900 ESSEX LANE, SUITE 1000
HOUSTON, TX 77027

EIN ▶

Phone no. 713-629-1381

Schedule B
(Form 990, 990-EZ, or 990-PF)
Department of the Treasury
Internal Revenue Service

Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

OMB No 1545-0047

2009

Name of the organization	Employer identification number
EDUCATIONAL ADVANCEMENT FOUNDATION	23-7001761

Organization type (check one):

Filers of:	**Section:**
Form 990 or 990-EZ	☐ 501(c)( ) (enter number) organization
	☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
	☐ 527 political organization
Form 990-PF	☒ 501(c)(3) exempt private foundation
	☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
	☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the **General Rule** or a **Special Rule.**
Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

☒ For an organization filing Form 990, 990-EZ, or 990-PF that received, during the year, $5,000 or more (in money or property) from any one contributor Complete Parts I and II

Special Rules

☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ that met the 33 1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of **(1)** $5,000 or **(2)** 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, aggregate contributions of more than $1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.

☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than $1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of $5,000 or more during the year. ▶ $ ____________

Caution. An organization that is not covered by the General Rule and/or the Special Rules does not file Schedule B (Form 990, 990-EZ, or 990-PF), but it **must** answer "No" on Part IV, line 2 of its Form 990, or check the box on line H of its Form 990-EZ, or on line 2 of its Form 990-PF, to certify that it does not meet the filing requirements of Schedule B (Form 990, 990-EZ, or 990-PF).

Schedule B (Form 990, 990-EZ, or 990-PF) (2009) Page 1 of 2 of Part I

Name of organization	Employer identification number
EDUCATIONAL ADVANCEMENT FOUNDATION	23-7001761

Part I **Contributors** (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	E. PAUL MOSBO 171 GROTON AVENUE CORTLAND, NY 13045	$ 500.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
2	HARRY LUCAS, JR 2303 RIO GRANDE STREET AUSTIN, TX 78705	$ 126,586.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
3	LUCAS PETROLEUM GROUP 2303 RIO GRANDE STREET AUSTIN, TX 78705	$ 82,928.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
4	SAM CRESWELL PO BOX 15173 SAN ANTONIO, TX 78212	$ 100.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
5	MARGARET MORROW 146 SUNRISE DRIVE PLATTSBURGH, NY 12901	$ 100.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
6	DAVID GREENSHIELDS 3350 HIGHWAY 6 SUGAR LAND, TX 77478	$ 100.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Name of organization	Employer identification number
EDUCATIONAL ADVANCEMENT FOUNDATION	23-7001761

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
7	TRAVIS MOEBES 9015 MELLOW BROOK DR. HOUSTON, TX 77099	$ 100.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
8	RICHARD SCHORI 1851 MORGANTON DR HENDERSON, NV 89052	$ 150.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
		$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

EDUCATIONAL ADVANCEMENT FOUNDATION CONTINUATION FOR 990-PF, PART IV
23-7001761 PAGE 1 OF 1

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse; or common stock, 200 shs. MLC Co.	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	350,000 SHS RABOBANK NEDER FLT 2009F	D	VARIOUS	VARIOUS
b	4,000 SHS BHP BILLION LTD ADR	D	VARIOUS	VARIOUS
c	193 SHS ENBRIDGE ENERGY MGMT	P	VARIOUS	VARIOUS
d	180 SHS KINDER MORGAN MGMT LLC	P	VARIOUS	VARIOUS
e	7,800 SHS REVUS ENERGY	D	VARIOUS	VARIOUS
f	25,000 SHS VENTURE PRODUCTIONS ORD	D	VARIOUS	VARIOUS
g	395 SHS DFA EMERGIN MARKETS CAP VAL	P	VARIOUS	VARIOUS
h	125 SHS DFA EMERGING MARKETS CAP VAL	P	VARIOUS	VARIOUS
i	335 SHS DFA SMALL US CAP	P	VARIOUS	VARIOUS
j	103 SHS HARDING LOEVNER EMERGING MARKETS	P	VARIOUS	VARIOUS
k	200 SHS PROSHARE SHORT S&P 500	P	VARIOUS	VARIOUS
l	CAPITAL GAINS DIVIDENDS			
m				
n				
o				

	(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	479,077.		486,253.	<7,176.>
b	228,305.		348,140.	<119,835.>
c	18.			18.
d	46.			46.
e	121,008.		127,387.	<6,379.>
f	466,278.		277,161.	189,117.
g	7,010.		9,576.	<2,566.>
h	3,664.		6,021.	<2,357.>
i	5,906.		9,704.	<3,798.>
j	4,260.		4,102.	158.
k	16,622.		15,022.	1,600.
l	617.			617.
m				
n				
o				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Losses (from col. (h)) Gains (excess of col. (h) gain over col. (k), but not less than "-0-")
	(i) F.M.V. as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any	
a				<7,176.>
b				<119,835.>
c				18.
d				46.
e				<6,379.>
f				189,117.
g				<2,566.>
h				<2,357.>
i				<3,798.>
j				158.
k				1,600.
l				617.
m				
n				
o				

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	49,445.
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

2009 DEPRECIATION AND AMORTIZATION REPORT

FORM 990-PF PAGE 1 990-PF

Asset No	Description	Date Acquired	Method	Life	C o n v	Line No	Unadjusted Cost Or Basis	Bus % Excl	Section 179 Expense	* Reduction In Basis	Basis For Depreciation	Beginning Accumulated Depreciation	Current Sec 179 Expense	Current Year Deduction	Ending Accumulated Depreciation
1	COMPUTER EQUIP	01/25/99	SL	5.00	HY	16	1,414.				1,414.	1,414.		0.	1,414.
2	COMPUTER EQUIP	08/30/00	SL	5.00	HY	16	2,282.				2,282.	2,282.		0.	2,282.
3	CAMCORDER	09/26/06	SL	5.00	HY	16	979.				979.	440.		196.	636.
	* TOTAL 990-PF PG 1 DEPR						4,675.				4,675.	4,136.		196.	4,332.

(D) - Asset disposed

* ITC, Salvage, Bonus, Commercial Revitalization Deduction, GO Zone

FORM 990-PF INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
SCHWAB	11,105.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	11,105.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
SCHWAB	15,478.	0.	15,478.
WELLS FARGO	3,794.	617.	3,177.
TOTAL TO FM 990-PF, PART I, LN 4	19,272.	617.	18,655.

FORM 990-PF OTHER INCOME STATEMENT 3

DESCRIPTION	(A) REVENUE PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME
ROYALTY INCOME	235.	235.	
OTHER INCOME	2,180.	2,180.	
TOTAL TO FORM 990-PF, PART I, LINE 11	2,415.	2,415.	

FORM 990-PF LEGAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
LEGAL FEES	10,417.	0.		10,417.
TO FM 990-PF, PG 1, LN 16A	10,417.	0.		10,417.

FORM 990-PF ACCOUNTING FEES STATEMENT 5

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ACCOUNTING FEES	12,143.	6,071.		6,072.
TO FORM 990-PF, PG 1, LN 16B	12,143.	6,071.		6,072.

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 6

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT	7,567.	7,567.		0.
CONSULTANTS	72,350.	0.		72,350.
TO FORM 990-PF, PG 1, LN 16C	79,917.	7,567.		72,350.

FORM 990-PF TAXES STATEMENT 7

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
PROPERTY TAXES	185.	92.		93.
FOREIGN TAX	67.	67.		0.
TO FORM 990-PF, PG 1, LN 18	252.	159.		93.

FORM 990-PF OTHER EXPENSES STATEMENT 8

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST-MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
BANK FEES	395.	198.		197.
HONORARIUM	9,300.	0.		9,300.
INSURANCE	1,230.	615.		615.
ALLOCATED OVERHEAD	82,928.	16,586.		66,342.
POSTAGE & DELIVERY	1,442.	0.		1,442.

TELEPHONE	6,073.	3,036.		3,037.
DUES & SUBSCRIPTIONS	2,677.	0.		2,677.
MISC OFFICE EXPENSES	1,056.	543.		543.
LICENSE AND PERMITS	65.	0.		65.
BOOKS AND PUBLICATIONS	20,451.	0.		20,451.
TO FORM 990-PF, PG 1, LN 23	125,617.	20,978.		104,669.

FORM 990-PF OTHER INVESTMENTS STATEMENT 9

DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
INTERACTIC LLC	COST	37,408.	62,500.
DFA EMERGING MKTS SMALL CAP	COST	0.	0.
DFA EMERGING MKTS VALUE PORTFOLIO	COST	0.	0.
DFA US SMALL CAP VALUE	COST	0.	0.
FIRST EAGLE OVERSEAS FD CL I	COST	24,059.	17,294.
GOLDMAN SACHS LG CAP VALUE FD INST CL	COST	45,177.	31,130.
ARTIO INTL EQUITY FUND II	COST	10,828.	7,145.
HARBOR SMALL CAP VALUE FD INST CL	COST	12,667.	9,606.
ISHARES S&P SM CAP 600 GROWTH INDEX FD	COST	21,077.	16,799.
ISHARES S&P 500 GROWTH INDEX FD	COST	41,990.	34,272.
PIMCO SHORT TERM FD INST CL	COST	147,461.	149,298.
RABOBANK NEDER FLT 2009F	COST	0.	0.
BHP BILLITON LTD ADR F	COST	0.	0.
ENBRIDGE ENERGY MANAGEMENT EEQ	COST	8,537.	10,252.
KINDER MORGAN MGMT LLC	COST	8,540.	9,781.
REVUS ENERGY ASA ORD F	COST	0.	0.
VENTURE PRODUCTIONS ORD F	COST	0.	0.
HARBOR INTERNATIONAL FD INST CL	COST	8,112.	8,088.
HARDING LOEVNER EMERGING MARKETS	COST	0.	0.
PRO SHARES SHORT S&P 500	COST	0.	0.
PIMCO TOTAL RETURN FUND	COST	99,072.	103,071.
LOOMIS SAYLES INVT B	COST	99,370.	109,314.
TOTAL TO FORM 990-PF, PART II, LINE 13		564,298.	568,550.

FORM 990-PF DEPRECIATION OF ASSETS NOT HELD FOR INVESTMENT STATEMENT 10

DESCRIPTION	COST OR OTHER BASIS	ACCUMULATED DEPRECIATION	BOOK VALUE
COMPUTER EQUIP	1,414.	1,414.	0.
COMPUTER EQUIP	2,282.	2,282.	0.
CAMCORDER	979.	636.	343.
TOTAL TO FM 990-PF, PART II, LN 14	4,675.	4,332.	343.

FORM 990-PF LIST OF SUBSTANTIAL CONTRIBUTORS PART VII-A, LINE 10 STATEMENT 11

NAME OF CONTRIBUTOR	ADDRESS
HARRY LUCAS, JR.	2303 RIO GRANDE AUSTIN, TX 78705
LUCAS PETROLEUM	2303 RIO GRANDE AUSTIN, TX 78705

FORM 990-PF PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS STATEMENT 12

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN-SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
HARRY LUCAS JR. 2303 RIO GRANDE ST AUSTIN, TX 78705	TRUSTEE 25.00	0.	0.	0.
A. E. LEISER, MD 14 E. GREENWAY PLAZA, STE 13R HOUSTON, TX 77046	TRUSTEE 1.00	1,000.	0.	0.
CHRIS BEH 670 PORTER STREET COQUITLAN, BRITISH COLUMBIA, CANADA V	TRUSTEE 1.00	0.	0.	0.
TERRY LESTER 6504 AUDEN HOUSTON, TX 77005	TRUSTEE 1.00	0.	0.	0.
HAMILTON BEAZLEY 411 WEST ELMO #24 AUSTIN, TX 78745	TRUSTEE 1.00	1,000.	0.	0.
FAIN BROCK 2303 RIO GRANDE ST AUSTIN, TX 78705	TREASURER 4.00	0.	0.	0.
RON DOUGLAS 8705 REDWOOD STREET COLLEGE STATION, TX 77845	TRUSTEE 1.00	1,000.	0.	0.
ALBERT LEWIS 101 COLORADO APT 1707 AUSTIN, TX 78701	TRUSTEE 2.00	1,000.	0.	0.
TOM INGRAM 284 WINDMILL MOUNTAIN ROAD SPRING BRANCH, TX 78070	TRUSTEE 1.00	1,000.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		5,000.	0.	0.

FORM 990-PF GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 13
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

GRANT COMMITTEE, EDUCATIONAL ADVANCEMENT FOUNDATION
2303 RIO GRANDE ST
AUSTIN, TX 78705

TELEPHONE NUMBER

512-469-1700

FORM AND CONTENT OF APPLICATIONS

SEE ATTACHED STATEMENT "A". ELIGIBLE APPLICANTS CAN REVIEW THE GRANT GUIDELINES AND DOWNLOAD THE APPLICATION FORM AT WWW.EDUCATIONALADVANCEMENTFOUNDATION.ORG. THE FOUNDATION CONSIDERS GRANTS THAT FURTHER AND/OR ENHANCE THE INQUIRY-BASED LEARNING METHODOLOGIES INSPIRED BY R.L. MOORE, AT ALL EDUCATION LEVELS, PARTICUALRY IN THE FIELDS OF MATHEMATICS AND SCIENCE.

ANY SUBMISSION DEADLINES

APPLICATIONS RECEIVED BY APR 15 - NOTIFIED BY JUN 30; RECEIVED BY OCT 15 - NOTIFIED BY DEC 31.

RESTRICTIONS AND LIMITATIONS ON AWARDS

GRANTS ARE GENERALLY AWARDED IN THE $5,000 TO $50,000 RANGE.

THE EDUCATIONAL ADVANCEMENT FOUNDATION 23-7001761

PART XV SUPPLEMENTARY INFORMATION

LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	RELATIONSHIP	RECIPIENT STATUS	PURPOSE OF GRANT	AMOUNT
Adelphi University Director of Sponsored Programs & Research 1 South Avenue Garden City, NY 11530	None	Exempt Organization	A professional development project to introduce inquiry based curriculum and pedagogy that will parallel the pre-AP Calculus and AP Calculas curricula at Hempstead High School	50,000 00
Associated Colleges of the South 1975 Century Blvd Ste 10 Atlanta, GA 30345	None	Exempt Organization	IBL workshop for ACS faculty	33,000 00
Auburn University Mathematics Dept Attn Michel Smith 221 Parker Hall Auburn, AL 36849	None	Exempt Organization	MathWiz Camp Honorarium for students in grades 7th-12th	1,500 00
Mathematical Association of America c/o Michael Pearson 1529 Eighteenth Street NW Washington, DC 20036	None	Exempt Organization	2010 Joint Mathematics Meeting Undergraduate Poster Session	2,000 00
Mathematical Association of America 1529 Eighteenth Street NW Washington, DC 20036	None	Exempt Organization	Continued support for the position of archivist for Archives of American Mathematics (AAM) which is responsible for continuing development & maintenance of AAM	67,607 03
National Association of Mathematics Dept of Mathematics Morgan State University 1700 E Coldspring Lane Baltimore, MD 21251	None	Exempt Organization	Travel support for MathFest 2009 student attendees	15,000 00
New York University Courant Institute 251 Mercer Street New York, NY 10012	None	Exempt Organization	To start up a new graduate student/postdoc teaching seminar	2,000 00
St Edward's University 3001 South Congress Avenue Austin, TX 78704-6489	None	Exempt Organization	Support curriculum development leading to expanded research opportunities for students in field of Mathematical Biology	33,600 00
Townson University Foundation, Inc Geannine Callaghan - Dir Fnd Relations Townson University 8000 York Rd Townson, MD 21252-0001	None	Exempt Organization	Design and teach an online graduate course in Applied Numerical Analysis using Moore Method, for a one day IBL workshop	5,670 00
University of Central Missouri Office of Sponsored Programs Ward Edwards 1800 University of Central Missouri Warrensburg, MO 64093	None	Exempt Organization	Conduct a MMM/IBL workshop and have 2 weekend follow-up sessions during academic year Focus will be on implementing MMM/IBL teaching strategy, problems encountered, student assessment, support issues, and idea sharing	38,781 00
The Regents of University of Colorado University of Colorado Department 220 Denver, CO 80291-0220	None	Exempt Organization	Assessment & Evaluation Center for EAF's national dissemination of Inquiry-Based Learning, carried out with the cooperation of the University of Texas-Austin, University of Michigan-Ann Arbor, University of California-Santa Barbara, Harvard University, and the University of Chicago	205,510 81
Centenary College 2911 Centenary Blvd Shreveport, LA 71134	None	Exempt Organization	Document projector & accessories to support teaching of Modern Algebra using IBL	1,000 00
University of Colorado Denver PO Box 173364 Denver, CO 80217-3364	None	Exempt Organization	Creation of an IBL geometry course, mentoring of a grad assistant in how to run an IBL course, and provide opportunity for all pre-service math teachers to take an IBL course	5,000 00
Coe College 1220 First Avenue NE Cedar Rapids, IA 52402	None	Exempt Organization	Developing of IBL activities and giving 2 future secondary mathematics teachers first-hand experience with developing and using IBL techniques	3,200 00

STATEMENT B

THE EDUCATIONAL ADVANCEMENT FOUNDATION 23-7001761

PART XV SUPPLEMENTARY INFORMATION

LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	RELATIONSHIP	RECIPIENT STATUS	PURPOSE OF GRANT	AMOUNT
California Polytechnic State University Mathematics Department 1 Grand Avenue San Luis Obispo, CA 93407	None	Exempt Organization	Develop notes for IBL Mathematica programing course	4,500 00
North Georgia College & State University Computer Science Department 82 College Circle Dahlonega, GA 30597	None	Exempt Organization	Prepare comprehensive review of IBL research, NSF CCLI program values pilot work that demonstrates the viability of project outcomes, and baseline measurement for non-IBL students needs to be established prior to IBL immersion	5,000 00
SUNY - Geneseo Department of Mathematics 1 College Circle Geneseo, NY 14454	None	Exempt Organization	Support for teaching Intro to Mathematical Proof using the Moore Method	1,000 00
U S Naval Academy Mathematics Department 572C Holloway Rd Annapolis, MD 21402	None	Exempt Organization	Support to bring in outside speakers once a month with an emphasis on IBL and active engagement	3,500 00
Augustana College 639 38th Street Rock Island, IL 61201	None	Exempt Organization	Support for a collegue to co-teach course as an apprentice practitioner of IBL teaching Would adapt a set of existing notes for similar courses	4,500 00
Furman University 3300 Poinsett Highway Greenville, SC 29613	None	Exempt Organization	Design a set of IBL notes for Operations Research course that help students develop the analytical skills	5,000 00
Trinity University Department of Mathematics One Trinity Place San Antonio, TX 78212	None	Exempt Organization	Support for developing a Number Theory Course using *Number Theory through Inquiry* by D C Marshall, E Odell, & M Starbird	3,500 00
SUNY - Plattsburgh Department of Mathematics 101 Broad Street Plattsburgh, NY 12901	None	Exempt Organization	Support for creating notes & teaching Real Analysis using modified Moore method	4,300 00
Louisiana State University One University Place Shreveport, LA 71115	None	Exempt Organization	Support for teaching College Geometry using IBL teaching method	5,000 00
University of Northen Iowa 213 East Bartlett Cedar Fall, IA 50614	None	Exempt Organization	Support for mentor travel or professor travel for improving teaching methods using IBL teaching method	2,500 00
Jacksonville University 2800 University Blvd N Jacksonville, FL 32211	None	Exempt Organization	Support for teaching Introduction to Proof course using a modified Moore method, travel to visit mentor	3,500 00
California Polytechnic State University Mathematics Department 1 Grand Avenue San Luis Obispo, CA 93407	None	Exempt Organization	Support to develop IBL course notes for Methods of Proof	3,000 00
Morehouse College Mathematics Department 830 Westview Drive Atlanta, GA 30314	None	Exempt Organization	Support to experiment and create problems and follow hybrid type IBL courses in Calculus III	4,500 00
North Dakota State University PO Box 6050 Fargo, ND 58108-6050	None	Exempt Organization	Support for implementing IBL method in classroom and a workshop for T A s to implement the IBL method in their classrooms	5,000 00
Morehouse College Mathematics Department 830 Westview Drive Atlanta, GA 30314	None	Exempt Organization	Support for creating IBL notes for Linear Algebra and Real Analysis I	4,500 00

STATEMENT B

THE EDUCATIONAL ADVANCEMENT FOUNDATION 23-7001761

PART XV SUPPLEMENTARY INFORMATION

LINE 3a GRANTS AND CONTRIBUTIONS PAID DURING THE YEAR

RECIPIENT NAME AND ADDRESS	RELATIONSHIP	RECIPIENT STATUS	PURPOSE OF GRANT	AMOUNT
Centre College 600 West Walnut Street Danville, KY 40422	None	Exempt Organization	Support for developing course notes for Differential Equations course and travel expenses to visit an IBL classroom	5,000 00
Wingate University Department of Mathematics PO Box 159 Wingate, NC 28174	None	Exempt Organization	Support to develop & coordinate weekly interdisciplinary teaching seminar plus travel support for speakers	4,000 00
Centre College 600 West Walnut Street Danville, KY 40422	None	Exempt Organization	Support for developing course notes for Introduction to Statistics course and travel expenses to visit an IBL classroom	5,000 00
				537,168 84

STATEMENT B