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

OMB No 1545-0052

2009

Department of the Treasury
Internal Revenue Service

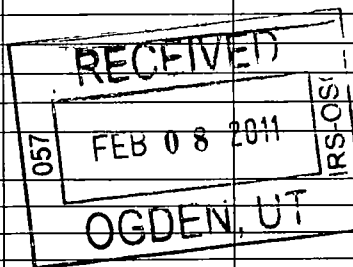
Note: The foundation may be able to use a copy of this return to satisfy state reporting requirements

For calendar year 2009, or tax year beginning 10/01, 2009, and ending 9/30, 2010

G Check all that apply ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name changeUse the
IRS label
Otherwise,
print
or type.
See Specific
InstructionsBURWEN EDUCATION FOUNDATION
1114 BLUE LAKE SQUARE
MOUNTAIN VIEW, CA 94040A Employer identification number
77-0560492B Telephone number (see the instructions)
(650) 967-3403C 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 foundationI Fair market value of all assets at end of year (from Part II, column (c), line 16) ☐ Accounting method: ☒ Cash ☐ Accrual
☐ Other (specify) _____

▶ \$ 569,572. (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) (see the instructions))		(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 (att sch)	13,470.			
	2 CK ☐ if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments				
	4 Dividends and interest from securities	14,617.	14,617.	14,617.	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10				
	b Gross sales price for all assets on line 6a 75,000.				
	7 Capital gain net income (from Part IV, line 2)				
	8 Net short-term capital gain				
	9 Income modifications				
ADMINISTRATIVE AND OPERATING EXPENSES	10a Gross sales less returns and allowances				
	b Less Cost of goods sold				
	c Gross profit/(loss) (att sch)				
	11 Other income (attach schedule)				
	12 Total. Add lines 1 through 11	28,087.	14,617.	14,617.	
	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch)				
	c Other prof fees (attach sch)				
17 Interest					
18 Taxes (attach schedule)(see instr) SEE STM 1	30.			30.	
19 Depreciation (attach sch) and depletion					
20 Occupancy					
21 Travel, conferences, and meetings	1,499.			1,499.	
22 Printing and publications					
23 Other expenses (attach schedule) SEE STATEMENT 2	5,273.			4,973.	
24 Total operating and administrative expenses. Add lines 13 through 23	6,802.			6,502.	
25 Contributions, gifts, grants paid PART XV	72,163.			72,163.	
26 Total expenses and disbursements. Add lines 24 and 25	78,965.	0.	0.	78,665.	
27 Subtract line 26 from line 12:					
a Excess of revenue over expenses and disbursements	-50,878.				
b Net investment income (if negative, enter -0-)		14,617.			
c Adjusted net income (if negative, enter -0-)			14,617.		



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Part II Balance Sheets

Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions.)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
A S S E T S	1 Cash — non-interest-bearing	45,516.	69,450.	69,450.
	2 Savings and temporary cash investments			
	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 (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch)			
	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 (attach schedule) STATEMENT 3	299,489.	224,677.	238,208.
	b Investments — corporate stock (attach schedule) STATEMENT 4	164,305.	164,305.	261,914.
	c Investments — corporate bonds (attach schedule)			
	11 Investments — land, buildings, and equipment basis			
Less accumulated depreciation (attach schedule)				
12 Investments — mortgage loans				
13 Investments — other (attach schedule)				
14 Land, buildings, and equipment basis				
Less accumulated depreciation (attach schedule)				
15 Other assets (describe)				
16 Total assets (to be completed by all filers — see instructions. Also, see page 1, item I)	509,310.	458,432.	569,572.	
L I A B I L I T I E S	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
F U N D A S S E T B A L A N C E S	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.	☐		
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.	☒		
	27 Capital stock, trust principal, or current funds	509,310.	458,432.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances (see the instructions)	509,310.	458,432.	
31 Total liabilities and net assets/fund balances (see the instructions)	509,310.	458,432.		

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	509,310.
2 Enter amount from Part I, line 27a	2	-50,878.
3 Other increases not included in line 2 (itemize)	3	
4 Add lines 1, 2, and 3	4	458,432.
5 Decreases not included in line 2 (itemize)	5	
6 Total net assets or fund balances at end of year (line 4 minus line 5) — Part II, column (b), line 30	6	458,432.

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 shares MLC Company)		(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a 75000 MATURED US TREASURY 3.5% DUE 12/15/09		P	12/05/06	12/15/09
b				
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 75,000.		75,000.	0.
b			
c			
d			
e			

Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a			0.
b			
c			
d			
e			

2 Capital gain net income or (net capital loss)	— If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 —	2	0.
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) (see the instructions) If (loss), enter -0- in Part I, line 8	— —	3	0.

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes☒ No

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

1 Enter the appropriate amount in each column for each year; see the instructions before making any entries

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2008	130,180.	669,307.	0.194500
2007	93,634.	658,356.	0.142224
2006	106,182.	1,403,931.	0.075632
2005	105,981.	728,150.	0.145548
2004	40,613.	521,218.	0.077919

2 Total of line 1, column (d)	2	0.635823
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	0.127165
4 Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	577,387.
5 Multiply line 4 by line 3	5	73,423.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	146.
7 Add lines 5 and 6	7	73,569.
8 Enter qualifying distributions from Part XII, line 4	8	78,665.

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 the instructions)

1 a 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 instr.)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ and enter 1% of Part I, line 27b		1	146.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, column (b)			
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		2	0.
3 Add lines 1 and 2		3	146.
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	146.
6 Credits/Payments			
a 2009 estimated tax prmts 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		146.
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
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>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.</i>		X
c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: (1) On the foundation ☐ \$ 0. (2) On foundation managers ☐ \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ☐ \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? <i>If 'Yes,' attach a detailed description of the activities</i>		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? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If 'Yes,' has it filed a tax return on Form 990-T for this year?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?		X
7 Did the foundation have at least \$5,000 in assets at any time during the year? <i>If 'Yes,' complete Part II, column (c), and Part XIV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see the instructions) CA		
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? <i>If 'No,' attach explanation</i>	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)? <i>If 'Yes,' complete Part XIV</i>	X	
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses.</i>		X

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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? Website address <u>N/A</u>	13	X	
14	The books are in care of <u>DAVID BURWEN</u> Telephone no <u>(650) 967-3403</u> Located at <u>1114 BLUE LAKE SQUARE MOUNTAIN VIEW CA</u> ZIP + 4 <u>94040</u>			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here <u>N/A</u> and enter the amount of tax-exempt interest received or accrued during the year <u>15</u>	<u>N/A</u>		

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 the instructions)? Organizations relying on a current notice regarding disaster assistance check here ☐	1b	N/A
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? If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>	☐ Yes ☒ No	
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 the instructions)	2b	N/A
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here <u>20__ , 20__ , 20__ , 20__</u>		
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)	3b	N/A
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

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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)? (see instructions)☐ Yes ☒ No**(5)** Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?☐ Yes ☒ No**b** If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

5b N/A

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?

7b N/A

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 (see instructions).

(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
DAVID BURWEN 1114 BLUE LAKE SQUARE MOUNTAIN VIEW, CA 94040	PRESIDENT 0	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see instructions). 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 — (see instructions). 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 SCHOLARSHIPS TO 15 STUDENTS AND RELATED ADMIN EXPENSES	
	60,565.
2 SCHOLARSHIPS AND SCHOOL DEVELOPMENT FOR CHILDREN OF SOLODAN, NEPAL	
	3,000.
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

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	1 a	498,462.
b Average of monthly cash balances	1 b	87,718.
c Fair market value of all other assets (see instructions)	1 c	
d Total (add lines 1a, b, and c)	1 d	586,180.
e Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1 e	0.
2 Acquisition indebtedness applicable to line 1 assets	2	0.
3 Subtract line 2 from line 1d	3	586,180.
4 Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	8,793.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3 Enter here and on Part V, line 4	5	577,387.
6 Minimum investment return. Enter 5% of line 5	6	28,869.

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	N/A	1
2a Tax on investment income for 2009 from Part VI, line 5	2 a	
b Income tax for 2009 (This does not include the tax from Part VI)	2 b	
c Add lines 2a and 2b	2 c	
3 Distributable amount before adjustments Subtract line 2c from line 1	3	
4 Recoveries of amounts treated as qualifying distributions	4	
5 Add lines 3 and 4	5	
6 Deduction from distributable amount (see instructions)	6	
7 Distributable amount as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	

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	1 a	78,665.
b Program-related investments — total from Part IX-B	1 b	
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)	3 a	
b Cash distribution test (attach the required schedule)	3 b	
4 Qualifying distributions Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	78,665.
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 (see instructions)	5	146.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	78,519.

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

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Part XIII Undistributed Income (see instructions)

N/A

	(a) Corpus	(b) Years prior to 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2009.				
a Enter amount for 2008 only				
b Total for prior years: 20 ____, 20 ____, 20 ____				
3 Excess distributions carryover, if any, to 2009				
a From 2004				
b From 2005				
c From 2006				
d From 2007				
e From 2008				
f Total of lines 3a through e				
4 Qualifying distributions for 2009 from Part XII, line 4 ▶ \$ ____				
a Applied to 2008, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2009 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2009 (If an amount appears in column (d), the same amount must be shown in column (a))				
6 Enter the net total of each column as indicated below:				
a Corpus: Add lines 3f, 4c, and 4e. Subtract line 5				
b Prior years' undistributed income: Subtract line 4b from line 2b				
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				
d Subtract line 6c from line 6b. Taxable amount — see instructions				
e Undistributed income for 2008: Subtract line 4a from line 2a. Taxable amount — see instructions				
f Undistributed income for 2009: Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)				
9 Excess distributions carryover to 2010. Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2005				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9)

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)

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

Tax year	Prior 3 years				
(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total	
14,617.	33,124.	32,355.	21,949.	102,045.	
12,424.	28,155.	27,502.	18,657.	86,738.	
78,665.	134,119.	99,606.	106,182.	418,572.	
15,100.				15,100.	
63,565.	134,119.	99,606.	106,182.	403,472.	
19,246.	22,310.	25,634.	46,798.	113,988.	

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 organization had \$5,000 or more in assets at any time during the year — see instructions.)**1 Information Regarding Foundation Managers:**

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

DAVID BURWEN

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 5

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

SEE STATEMENT FOR LINE 2A

c Any submission deadlines

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

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 6				
Total			3a	72,163.
b Approved for future payment				
Total			3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated

Enter gross amounts unless otherwise indicated		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion 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					
4	Dividends and interest from securities			14	14,617.	
5	Net rental income or (loss) from real estate					
a	Debt-financed property					
b	Not debt-financed property					
6	Net rental income or (loss) from personal property					
7	Other investment income					
8	Gain or (loss) from sales of assets other than inventory					
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)				14,617.	
13	Total. Add line 12, columns (b), (d), and (e)				13	14,617.

(See worksheet in the instructions for line 13 to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

[illegible]

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

BURWEN EDUCATION FOUNDATION

Employer identification number

77-0560492

Organization type (check one)

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 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)/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 their 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)

BAA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

BURWEN EDUCATION FOUNDATION

77-0560492

Part I Contributors (see instructions)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	DAVID BURWEN 1114 BLUE LAKE SQUARE MOUNTAIN VIEW, CA 94040	\$ 11,570.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)
		\$	Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution)

Name of organization

Employer identification number

BURWEN EDUCATION FOUNDATION

77-0560492

Part II Noncash Property (see instructions)

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A		
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	
		\$	

BAA

Schedule B (Form 990, 990-EZ, or 990-PF) (2009)

Name of organization

Employer identification number

BURWEN EDUCATION FOUNDATION

77-0560492

Part III Exclusively religious, charitable, etc, individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. (Complete cols (a) through (e) and the following line entry)For organizations completing Part III, enter total of *exclusively* religious, charitable, etc, contributions of **\$1,000 or less** for the year (Enter this information once – see instructions)

► \$ N/A

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

BURWEN EDUCATION FOUNDATION

77-0560492

STATEMENT 1
FORM 990-PF, PART I, LINE 18
TAXES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FRANCHISE TAX BOARD	\$ 10.			\$ 10.
SECRETARY OF STATE FILING FEE	20.			20.
TOTAL	<u>\$ 30.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 30.</u>

STATEMENT 2
FORM 990-PF, PART I, LINE 23
OTHER EXPENSES

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADMINISTRATIVE	\$ 2,084.			\$ 2,084.
PRIOR PERIOD ADJUSTMENT	300.			
REGISTRY OF CHARITABLE TRUSTS	25.			25.
STUDENT ACTIVITIES	2,864.			2,864.
TOTAL	<u>\$ 5,273.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 4,973.</u>

STATEMENT 3
FORM 990-PF, PART II, LINE 10A
INVESTMENTS - U.S. AND STATE GOVERNMENT OBLIGATIONS

	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
U.S. GOVERNMENT OBLIGATIONS			
MORGAN STANLEY	COST	\$ 224,677.	\$ 238,208.
		<u>\$ 224,677.</u>	<u>\$ 238,208.</u>
TOTAL		<u>\$ 224,677.</u>	<u>\$ 238,208.</u>

STATEMENT 4
FORM 990-PF, PART II, LINE 10B
INVESTMENTS - CORPORATE STOCKS

	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
CORPORATE STOCKS			
DEUTSCHE BANK ALEX. BROWN	COST	\$ 164,305.	\$ 261,914.
TOTAL		<u>\$ 164,305.</u>	<u>\$ 261,914.</u>

BURWEN EDUCATION FOUNDATION

77-0560492

STATEMENT 5
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

NAME OF GRANT PROGRAM:
NAME: DR SUSAN JO BURWEN
CARE OF:
STREET ADDRESS: 1114 BLUE LAKE SQUARE
CITY, STATE, ZIP CODE: MOUNTAIN VIEW, CA 94040
TELEPHONE: (650) 967-3403
FORM AND CONTENT: SEE ATTACHED APPLICATION
SUBMISSION DEADLINES: DEADLINE FOR SUBMITTING APPLICATIONS SEPTEMBER 15
RESTRICTIONS ON AWARDS: RESTRICTED TO SCHOLARSHIPS IN MOUNTAIN VIEW CA AND
EDUCATION DEVELOPMENT IN NEPAL

STATEMENT 6
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
AMY FERRECCIO	NONE	N/A	SCHOLARSHIP	\$ 8,983.
'				
ANGELICA MANTILLA	NONE	N/A	SCHOLARSHIP	1,023.
'				
BRYAN EDWARDS	NONE	N/A	SCHOLARSHIP	1,780.
'				
CELIA HALSTED	NONE	N/A	SCHOLARSHIP	1,000.
'				
JOSE ARREOLA	NONE	N/A	SCHOLARSHIP	11,320.
'				
JESSICA HAMON	NONE	N/A	SCHOLARSHIP	24.
'				
JOSE HIRAM QUIROZ SOBERANES	NONE	N/A	SCHOLARSHIP	1,000.
'				
JESSICA JAIMEE CRUZ	NONE	N/A	SCHOLARSHIP	500.
'				
JOSE SERRANO	NONE	N/A	SCHOLARSHIP	112.
'				
JONATHAN TORRES	NONE	N/A	SCHOLARSHIP	9,693.
'				
KARLA ALACON	NONE	N/A	SCHOLARSHIP	2,000.
'				

BURWEN EDUCATION FOUNDATION

77-0560492

STATEMENT 6 (CONTINUED)
 FORM 990-PF, PART XV, LINE 3A
 RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND- ATION STATUS	PURPOSE OF GRANT	AMOUNT
MARITZA ARREOLA ,	NONE	N/A	SCHOLARSHIP	\$ 500.
NICK HAMBLETON-GARCIA ,	NONE	N/A	SCHOLARSHIP	8,524.
PAULINE TAYLOR ,	NONE	N/A	SCHOLARSHIP	500.
SIDIKIE DOLLEH ,	NONE	N/A	SCHOLARSHIP	7,104.
CHILDREN OF NEPAL ,	NONE	N/A	SCHOLARSHIPS & SCHOOL SUPPLIES	3,000.
AMERICAN HIMALAYAN FOUNDATION ,	NONE	PUB CHAR	3 TEACHERS FOR SCHOOL IN SOLOBAN, NEPAL	6,000.
ASHRAYA FOUNDATION NEPAL ,	NONE	OPER FOUN	SCHOOL SUPPLIES FOR CHILDREN OF NEPAL	4,100.
MOUNTAIN VIEW HIGH SCHOOL ,	NONE	SCHOOL	ENGINEERING TECHNOLOGY	5,000.
TOTAL				\$ <u>72,163.</u>

Scholarship Application Form



Name _____ Social Security # _____
 Last (Family) First Middle

Home Address: _____
 Number and Street (area code) Home Phone

 City State Zip Code (area code) Cell Phone

Place of Birth: _____ Email _____
 City State Country

Date of Birth: _____ Are you a US Citizen. ☐ Yes ☐ No
 Month/Day/Year

If not US Citizen, Country of Citizenship: _____

If not a US citizen, Immigration Status ☐ Immigrant/US Permanent Resident ☐ Refugee ☐ Undocumented

If Nonimmigrant, type of visa you hold or for which you plan to apply _____

Parents' or Guardians' Name(s) _____

Parents' or Guardians' Highest Level of Formal Education (check one box for each parent or guardian)

Name		Name
	No High School	
	Some High School	
	High School Graduate	
	Some College/University	
	Two year College Graduate	
	Four Year College/University Graduate	
	Post Graduate Study	

TO ALL CANDIDATES FOR SCHOLARSHIP

We are interested in the total person and not just your academic performance. Therefore, we want to learn about how you spend your time when you are out of school. Also, we would like to know about any noteworthy skills and experiences you have had, both in and out of the classroom. We are interested in your work experience and the depth of your commitment to getting an education and to succeeding in school. We appreciate candor. So be yourself and complete this form carefully and honestly.

Applicant's Name _____

FINANCIAL INFORMATION

Number of dependents at home: _____
Number of brothers/sisters currently in college: _____

Is your home rented or owned? _____
Monthly rent or mortgage payment: _____

If home is owned

Estimated fair market value: _____

Balance of all mortgages (combine first, second, third etc) _____

Does your family own a second home or any other real estate? If so, does it generate any income? How much?

Parents' or Guardians' Gross Annual Income latest year: \$ _____

Parents' or Guardians' Gross Annual Income previous year: \$ _____

Student's Gross Annual Income latest year: \$ _____

Student's Gross Annual Income previous year: \$ _____

Father's or Guardian's Current Occupation: _____ # of years: _____

Father's or Guardian's Previous Occupation: _____ # of years: _____

Mother's or Guardian's Current Occupation: _____ # of years: _____

Mother's or Guardian's Previous Occupation: _____ # of years: _____

Please list any anticipated unusual expenses, write-offs, or significant changes in your family's income for the current and/or next school year:

Please list the people you live with and how you are related to them. Please tell us about any siblings who don't live with you.

Please attach copies of the first 2 pages of student's (if applicable) and parents'/guardians' Federal Income Tax Returns for the most recent year filed.

Signature of Parent or Guardian

Date

Signature of Applicant

Date

Applicant's Name _____

1 List below the high schools that you have attended, beginning with ninth grade:

School	Location	Dates of Attendance

2a Have you ever been placed on probation, suspended or expelled. ☐ Yes ☐ No

2b. Have you ever been convicted of a criminal offense ☐ Yes ☐ No

(If you answer yes to 2a or 2b, please explain fully on a separate sheet)

3 Junior Year Courses

Please list the courses you took in your junior year and indicate level (standard, honors, AP):

First Semester	Second Semester

4 List any academic awards or special academic programs since the beginning of your ninth grade (please include the class year)

5. Extracurricular and Personal Activities

The following chart is meant to give us an organized picture of your involvement, talents and achievements outside of the classroom. Please list your principal extracurricular, community, and personal activities. In the "Positions held" column, include your activities and any positions of leadership. Consider appointed and/or elective offices you have held, participation in the arts, athletics, and/or clubs, involvement in out-of-school activities and/or interests, community service. This is your opportunity to show how your involvement has made a difference to your school and/or your community. Use the space provided, but do not feel compelled to fill in all of the blanks.

Include

Activity or Interest	Grade Level		Approx. time spent		Positions held, honors won or letters earned
	10	11	hrs/wk	wks/yr	

6. Work Experience

Applicant's Name _____

We don't expect every applicant to have work experience, but if you have worked on a regular basis during high school, we'd like to know what you have done. Please indicate jobs held during both the school year and summer vacation.

Job(s) Held	Employer	Approx. dates of employment	Approx. number of hrs/wk

To what use have you put your earnings? _____

During the school year do you work weekends, after school, or both? _____

Do you contribute to your family's support? What adjustment would your family make to losing the income you provide?

7 Please describe what colleges you want to apply to, the reasons for those choices, and the field(s) of study you think you might pursue in college.

Applicant's Name _____

8. Application Questions

The following questions are designed to get a more complete picture of you as a person. Answering these questions may help you prepare for future college interviews. There may be some overlap among the questions. Please answer each one concisely, in 200 words or less. A separate page is provided for each question to make it easier to format your answer. We appreciate brevity, and do not expect you to fill the entire page.

8.1 What do you consider to be your major contribution(s) to your family, friends, school, church or community?

Applicant's Name _____

8.2 Of your activities, interests and experiences in or out of school, which is the most meaningful and why?

Applicant's Name _____

- 8.3 Sharing intellectual interests is an important aspect of college or university life. Describe an experience or idea that you find intellectually exciting and explain why

Applicant's Name _____

8.4 What do you consider to be your major strengths and weaknesses?

Applicant's Name. _____

- 8.5** What was a major obstacle that you faced in successfully pursuing your educational goals? What did you do to overcome this obstacle, what help did you get and what was the result?

Applicant's Name _____

8.6 What is your definition of success in life?

Applicant's Name _____

8.7 You may use this space to tell us anything else you would like us to know about you

Applicant's Name _____

9. Essay

The objective of the Burwen Education Foundation Scholarship is to enable you to get a college education that will provide you with the opportunity to have a more successful life and make greater contributions to your family, community and world. Explain why receiving this scholarship will fulfill the objective of the Foundation. Please answer concisely, in 250 words or less.

Applicant's Name _____

10. The Burwen Education Foundation's Honor Code is fundamental in fostering an atmosphere of trust and respect between students and the Foundation. It provides for a standard of honesty and integrity in all aspects of life. Your signature below indicates acceptance of the spirit of the Honor Code and signifies that all of the information you have provided and will provide in the future is your own work and to the best of your knowledge is complete and accurate.

Signature _____ Date _____

11. Mentoring Agreement.

If you are awarded the Burwen Education Foundation Scholarship, after graduation from college, you will be required to mentor other recipients of this scholarship, to help them succeed in getting their college diploma. By signing below, you agree to provide this future mentoring.

Signature _____ Date _____

12. If you are selected as a recipient of a Burwen Education Foundation Scholarship, you acknowledge and agree to the following:

a. As soon as the following documents become available, submit:

- Official transcripts from first semester senior year
- Copies of completed FAFSA forms
- Official results of SAT II (Achievement) Tests and AP Exams taken during senior year
- Copies of Letters of Acceptance to Colleges/Universities
- Notification about other awards and scholarships received by the end of senior year

b. The scholarship amount will be paid directly to the college/university in which you enroll. It will be your responsibility to notify the BEF, in a timely manner, as to where the scholarship award money is to be sent and when the payment is due.

c. The scholarship support will be provided on an annual basis for up to four years of college providing that you:

- Enroll in a four-year college during the academic year following high school graduation
- Pursue a full-time academic course of study.
- Maintain a minimum GPA of 2.5
- Remain on-track for graduation in an academic major.
- Participate in the mentoring program by:
 - accepting mentoring, especially during freshman and sophomore years
 - becoming a mentor to other scholarship recipients beginning in the junior year
 - attending annual BEF meetings

d. The scholarship award may only be used for the purpose of attending a four-year college/university. No part of the scholarship award may be used for any other purpose.

Signature _____ Date _____

Applicant's Name _____

SUBMISSION INSTRUCTIONS AND CHECKLIST

In addition to this application form, please submit

- An official transcript of your high school record, inclusive of junior year
- Official results of SAT II (Achievement) tests and AP exams taken during your junior year
- Two or three Letters of Recommendation from teachers and other adults who have had a significant influence on your success Letters of Recommendation from relatives or members of the selection committee are ineligible

If extra pages are required, write your name on the top right corner of each page, and number the pages at the bottom. Please answer all questions to the best of your ability An incomplete application can only diminish your chances of being selected

WHERE TO SUBMIT THE APPLICATION:

Submit the application to the AVID coordinator at your high school

WHEN TO SUBMIT THE APPLICATION

Applications are due by Sept 15 of the senior year of high school.

NOTIFICATION of the scholarship award will be made by October 15 of the senior year of high school.

All submitted materials will be held in confidence and released only to members of the selection committee The selection committee is composed of teachers and staff at Mountain View High School and trustees and administrators of the BEF