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Part III

Statement of Program Service Accomplishments

Check if Schedule O contains a response to any question in this Part III ☐ Yes ☒ No

1

Briefly describe the organization's mission

To inspire and prepare young people to succeed in a global economy See additional mission information on Schedule O

2

Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-EZ? ☐ Yes ☒ No

If "Yes," describe these new services on Schedule O

3

Did the organization cease conducting, or make significant changes in how it conducts, any program services? ☐ Yes ☒ No

If "Yes," describe these changes on Schedule O

4

Describe the exempt purpose achievements for each of the organization's three largest program services by expenses Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and allocations to others, the total expenses, and revenue, if any, for each program service reported

4a

(Code ) (Expenses \$ 28,586,737 including grants of \$ 10,994,799 ) (Revenue \$ 12,586,829 )

THE ORGANIZATION ASSISTED ITS US MEMBERS AND INTERNATIONAL MEMBERS AROUND THE WORLD IN SETTING UP AND/OR MAINTAINING THEIR OWN ORGANIZATION TO ADMINISTER JUNIOR ACHIEVEMENT PROGRAMS JA'S MEMBERS REACHED APPROXIMATELY 10.6 MILLION ELEMENTARY THROUGH POST SECONDARY STUDENTS FOR THE YEAR ENDED 6/30/2011

4b

(Code ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4c

(Code ) (Expenses \$ including grants of \$ ) (Revenue \$ )

4d

Other program services (Describe in Schedule O )

(Expenses \$ including grants of \$ ) (Revenue \$ )

4e

Total program service expenses \$ 28,586,737

Part IV Checklist of Required Schedules

|                                                                                                                                                                                                                                                                                                                                         | Yes     | No |
|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------|----|
| 1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A                                                                                                                    | 1 Yes   |    |
| 2 Is the organization required to complete Schedule B, Schedule of Contributors (see instruction)?                                                                                                                                                   | 2 Yes   |    |
| 3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I                                                                 | 3       | No |
| 4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II                                                  | 4 Yes   |    |
| 5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III                                                                                                           | 5       |    |
| 6 Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If "Yes," complete Schedule D, Part I   | 6       | No |
| 7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas or historic structures? If "Yes," complete Schedule D, Part II                                      | 7       | No |
| 8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III                                                                                                    | 8       | No |
| 9 Did the organization report an amount in Part X, line 21, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV  | 9 Yes   |    |
| 10 Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If "Yes," complete Schedule D, Part V                                                                                        | 10 Yes  |    |
| 11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable                                                                                                                                                                                       |         |    |
| a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI.                                                                                                                 | 11a Yes |    |
| b Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII.                                             | 11b     | No |
| c Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII.                                            | 11c     | No |
| d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX.                                                              | 11d     | No |
| e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.                                                                                                                           | 11e     | No |
| f Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? If "Yes," complete Schedule D, Part X.    | 11f     | No |
| 12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI, XII, and XIII                                                                                          | 12a Yes |    |
| b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered 'No' to line 12a, then completing Schedule D, Parts XI, XII, and XIII is optional              | 12b     | No |
| 13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E                                                                                                                                                                                                                                    | 13      | No |
| 14a Did the organization maintain an office, employees, or agents outside of the United States?                                                                                                                                                                                                                                         | 14a     | No |
| b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, and program service activities outside the United States? If "Yes," complete Schedule F, Parts I and IV                  | 14b Yes |    |
| 15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or assistance to any organization or entity located outside the U S ? If "Yes," complete Schedule F, Parts II and IV                                    | 15 Yes  |    |
| 16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or assistance to individuals located outside the U S ? If "Yes," complete Schedule F, Parts III and IV                                        | 16      | No |
| 17 Did the organization report a total of more than \$15,000, of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions)                                                                                                                       | 17      | No |
| 18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II                                                                                                                                                       | 18      | No |
| 19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III                                                                                                                                                                                 | 19      | No |
| 20a Did the organization operate one or more hospitals? If "Yes," complete Schedule H                                                                                                                                                                                                                                                   | 20a     | No |
| b If "Yes" to line 20a, did the organization attach its audited financial statement to this return? <b>Note.</b> Some Form 990 filers that operate one or more hospitals must attach audited financial statements (see instructions)                                                                                                    | 20b     |    |

Part IV

Checklist of Required Schedules (continued)

|     |                                                                                                                                                                                                                                                                                        |     |     |    |
|-----|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|----|
| 21  | Did the organization report more than \$5,000 of grants and other assistance to governments and organizations in the United States on Part IX, column (A), line 1? <i>If "Yes," complete Schedule I, Parts I and II</i> . . . . .                                                      | 21  | Yes |    |
| 22  | Did the organization report more than \$5,000 of grants and other assistance to individuals in the United States on Part IX, column (A), line 2? <i>If "Yes," complete Schedule I, Parts I and III</i> . . . . .                                                                       | 22  |     | No |
| 23  | Did the organization answer "Yes" to Part VII, Section A, questions 3, 4, or 5, about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? <i>If "Yes," complete Schedule J</i> . . . . .            | 23  | Yes |    |
| 24a | Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b–24d and complete Schedule K. If "No," go to line 25</i> . . . . . | 24a |     | No |
| b   | Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . .                                                                                                                                                                              | 24b |     |    |
| c   | Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds? . . . . .                                                                                                                                   | 24c |     |    |
| d   | Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . .                                                                                                                                                                        | 24d |     |    |
| 25a | <b>Section 501(c)(3) and 501(c)(4) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? <i>If "Yes," complete Schedule L, Part I</i> . . . . .                                                                  | 25a |     | No |
| b   | Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i> . . . . .   | 25b |     | No |
| 26  | Was a loan to or by a current or former officer, director, trustee, key employee, highly compensated employee, or disqualified person outstanding as of the end of the organization's tax year? <i>If "Yes," complete Schedule L, Part II</i> . . . . .                                | 26  |     | No |
| 27  | Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor, or a grant selection committee member, or to a person related to such an individual? <i>If "Yes," complete Schedule L, Part III</i> . . . . .        | 27  |     | No |
| 28  | Was the organization a party to a business transaction with one of the following parties? (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions)                                                                                          |     |     |    |
| a   | A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .                                                                                                                                                               | 28a |     | No |
| b   | A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .                                                                                                                                            | 28b |     | No |
| c   | An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i> . . . . .                                                | 28c |     | No |
| 29  | Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>                                                                                                                                                                        | 29  |     | No |
| 30  | Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i> . . . . .                                                                                              | 30  |     | No |
| 31  | Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i> . . . . .                                                                                                                                                    | 31  |     | No |
| 32  | Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i> . . . . .                                                                                                                                  | 32  |     | No |
| 33  | Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i> . . . . .                                                                                  | 33  |     | No |
| 34  | Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Parts II, III, IV, and V, line 1</i> . . . . .                                                                                                                                     | 34  |     | No |
| 35  | Is any related organization a controlled entity within the meaning of section 512(b)(13)? . . . . .                                                                                                                                                                                    | 35  |     | No |
| a   | Did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . . <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No       |     |     |    |
| 36  | <b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i> . . . . .                                                                                       | 36  |     | No |
| 37  | Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>                                                   | 37  |     | No |
| 38  | Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11 and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O . . . . .                                                                                           | 38  | Yes |    |

| Part V Statements Regarding Other IRS Filings and Tax Compliance                                                                                                                                                                                                        |                                                                                                                                                                                                                                            |     |     |    |    |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|----|----|
| Check if Schedule O contains a response to any question in this Part V <input type="checkbox"/>                                                                                                                                                                         |                                                                                                                                                                                                                                            |     |     |    |    |
|                                                                                                                                                                                                                                                                         |                                                                                                                                                                                                                                            |     | Yes | No |    |
| 1a                                                                                                                                                                                                                                                                      | Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable.                                                                                                                                                              | 1a  | 47  |    |    |
| b                                                                                                                                                                                                                                                                       | Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.                                                                                                                                                           | 1b  | 0   |    |    |
| c                                                                                                                                                                                                                                                                       | Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?                                                                                   | 1c  | Yes |    |    |
| 2a                                                                                                                                                                                                                                                                      | Enter the number of employees reported on Form W-3, <i>Transmittal of Wage and Tax Statements</i> filed for the calendar year ending with or within the year covered by this return.                                                       | 2a  | 95  |    |    |
| b                                                                                                                                                                                                                                                                       | If at least one is reported on line 2a, did the organization file all required federal employment tax returns?                                                                                                                             | 2b  | Yes |    |    |
| <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).                                                                                                                                                       |                                                                                                                                                                                                                                            |     |     |    |    |
| 3a                                                                                                                                                                                                                                                                      | Did the organization have unrelated business gross income of \$1,000 or more during the year?                                                                                                                                              | 3a  |     |    | No |
| b                                                                                                                                                                                                                                                                       | If "Yes," has it filed a Form 990-T for this year? If "No," provide an explanation in Schedule O.                                                                                                                                          | 3b  |     |    |    |
| 4a                                                                                                                                                                                                                                                                      | At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? | 4a  |     |    | No |
| b                                                                                                                                                                                                                                                                       | If "Yes," enter the name of the foreign country:<br>See instructions for filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts.                                                                         |     |     |    |    |
| 5a                                                                                                                                                                                                                                                                      | Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?                                                                                                                                      | 5a  |     |    | No |
| b                                                                                                                                                                                                                                                                       | Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?                                                                                                                           | 5b  |     |    | No |
| c                                                                                                                                                                                                                                                                       | If "Yes" to line 5a or 5b, did the organization file Form 8886-T?                                                                                                                                                                          | 5c  |     |    |    |
| 6a                                                                                                                                                                                                                                                                      | Does the organization have annual gross receipts that are normally greater than \$100,000, and did the organization solicit any contributions that were not tax deductible?                                                                | 6a  |     |    | No |
| b                                                                                                                                                                                                                                                                       | If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?                                                                                              | 6b  |     |    |    |
| 7 Organizations that may receive deductible contributions under section 170(c).                                                                                                                                                                                         |                                                                                                                                                                                                                                            |     |     |    |    |
| a                                                                                                                                                                                                                                                                       | Did the organization receive a payment in excess of \$75 made partly as a contribution and partly for goods and services provided to the payor?                                                                                            | 7a  |     |    | No |
| b                                                                                                                                                                                                                                                                       | If "Yes," did the organization notify the donor of the value of the goods or services provided?                                                                                                                                            | 7b  |     |    |    |
| c                                                                                                                                                                                                                                                                       | Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?                                                                                                       | 7c  |     |    | No |
| d                                                                                                                                                                                                                                                                       | If "Yes," indicate the number of Forms 8282 filed during the year.                                                                                                                                                                         | 7d  |     |    |    |
| e                                                                                                                                                                                                                                                                       | Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?                                                                                                                            | 7e  |     |    | No |
| f                                                                                                                                                                                                                                                                       | Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?                                                                                                                               | 7f  |     |    | No |
| g                                                                                                                                                                                                                                                                       | If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?                                                                                                           | 7g  |     |    |    |
| h                                                                                                                                                                                                                                                                       | If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?                                                                                                         | 7h  |     |    |    |
| 8 Sponsoring organizations maintaining donor advised funds and section 509(a)(3) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year? |                                                                                                                                                                                                                                            |     |     |    |    |
| 8                                                                                                                                                                                                                                                                       |                                                                                                                                                                                                                                            |     |     |    |    |
| 9 Sponsoring organizations maintaining donor advised funds.                                                                                                                                                                                                             |                                                                                                                                                                                                                                            |     |     |    |    |
| a                                                                                                                                                                                                                                                                       | Did the organization make any taxable distributions under section 4966?                                                                                                                                                                    | 9a  |     |    |    |
| b                                                                                                                                                                                                                                                                       | Did the organization make a distribution to a donor, donor advisor, or related person?                                                                                                                                                     | 9b  |     |    |    |
| 10 Section 501(c)(7) organizations. Enter                                                                                                                                                                                                                               |                                                                                                                                                                                                                                            |     |     |    |    |
| a                                                                                                                                                                                                                                                                       | Initiation fees and capital contributions included on Part VIII, line 12.                                                                                                                                                                  | 10a |     |    |    |
| b                                                                                                                                                                                                                                                                       | Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.                                                                                                                                               | 10b |     |    |    |
| 11 Section 501(c)(12) organizations. Enter                                                                                                                                                                                                                              |                                                                                                                                                                                                                                            |     |     |    |    |
| a                                                                                                                                                                                                                                                                       | Gross income from members or shareholders.                                                                                                                                                                                                 | 11a |     |    |    |
| b                                                                                                                                                                                                                                                                       | Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them).                                                                                                               | 11b |     |    |    |
| 12a Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?                                                                                                                                                          |                                                                                                                                                                                                                                            |     |     |    |    |
| b                                                                                                                                                                                                                                                                       | If "Yes," enter the amount of tax-exempt interest received or accrued during the year.                                                                                                                                                     | 12b |     |    |    |
| 13 Section 501(c)(29) qualified nonprofit health insurance issuers.                                                                                                                                                                                                     |                                                                                                                                                                                                                                            |     |     |    |    |
| a                                                                                                                                                                                                                                                                       | Is the organization licensed to issue qualified health plans in more than one state?<br><b>Note.</b> See the instructions for additional information the organization must report on Schedule O.                                           | 13a |     |    |    |
| b                                                                                                                                                                                                                                                                       | Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans.                                                                                 | 13b |     |    |    |
| c                                                                                                                                                                                                                                                                       | Enter the amount of reserves on hand.                                                                                                                                                                                                      | 13c |     |    |    |
| 14a Did the organization receive any payments for indoor tanning services during the tax year?                                                                                                                                                                          |                                                                                                                                                                                                                                            |     |     |    |    |
| 14a                                                                                                                                                                                                                                                                     |                                                                                                                                                                                                                                            |     |     |    |    |
| b                                                                                                                                                                                                                                                                       | If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O.                                                                                                                                 | 14b |     |    | No |

Part VI

Governance, Management, and Disclosure

For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O. See instructions.  
Check if Schedule O contains a response to any question in this Part VI

| Section A. Governing Body and Management |                                                                                                                                                                                                                     |    | Yes | No |
|------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|-----|----|
| 1a                                       | Enter the number of voting members of the governing body at the end of the tax year                                                                                                                                 | 52 |     |    |
| b                                        | Enter the number of voting members included in line 1a, above, who are independent                                                                                                                                  | 51 |     |    |
| 2                                        | Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?                                               | 2  |     | No |
| 3                                        | Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? | 3  |     | No |
| 4                                        | Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?                                                                                                    | 4  |     | No |
| 5                                        | Did the organization become aware during the year of a significant diversion of the organization's assets?                                                                                                          | 5  |     | No |
| 6                                        | Does the organization have members or stockholders?                                                                                                                                                                 | 6  | Yes |    |
| 7a                                       | Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body?                                                                                         | 7a | Yes |    |
| b                                        | Are any decisions of the governing body subject to approval by members, stockholders, or other persons?                                                                                                             | 7b | Yes |    |
| 8                                        | Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following                                                                                    |    |     |    |
| a                                        | The governing body?                                                                                                                                                                                                 | 8a | Yes |    |
| b                                        | Each committee with authority to act on behalf of the governing body?                                                                                                                                               | 8b | Yes |    |
| 9                                        | Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? If "Yes," provide the names and addresses in Schedule O        | 9  |     | No |

| Section B. Policies (This Section B requests information about policies not required by the Internal Revenue Code.) |                                                                                                                                                                                                                                                                                                |     | Yes | No |
|---------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|-----|----|
| 10a                                                                                                                 | Does the organization have local chapters, branches, or affiliates?                                                                                                                                                                                                                            | 10a | Yes |    |
| b                                                                                                                   | If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization?                                                                             | 10b | Yes |    |
| 11a                                                                                                                 | Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form?                                                                                                                                                                             | 11a | Yes |    |
| b                                                                                                                   | Describe in Schedule O the process, if any, used by the organization to review this Form 990                                                                                                                                                                                                   |     |     |    |
| 12a                                                                                                                 | Does the organization have a written conflict of interest policy? If "No," go to line 13                                                                                                                                                                                                       | 12a | Yes |    |
| b                                                                                                                   | Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?                                                                                                                                                              | 12b | Yes |    |
| c                                                                                                                   | Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done                                                                                                                                             | 12c | Yes |    |
| 13                                                                                                                  | Does the organization have a written whistleblower policy?                                                                                                                                                                                                                                     | 13  | Yes |    |
| 14                                                                                                                  | Does the organization have a written document retention and destruction policy?                                                                                                                                                                                                                | 14  |     | No |
| 15                                                                                                                  | Did the process for determining compensation of the following persons include a review and approval by independent persons, comparability data, and contemporaneous substantiation of the deliberation and decision?                                                                           |     |     |    |
| a                                                                                                                   | The organization's CEO, Executive Director, or top management official                                                                                                                                                                                                                         | 15a | Yes |    |
| b                                                                                                                   | Other officers or key employees of the organization                                                                                                                                                                                                                                            | 15b | Yes |    |
|                                                                                                                     | If "Yes" to line 15a or 15b, describe the process in Schedule O (See instructions)                                                                                                                                                                                                             |     |     |    |
| 16a                                                                                                                 | Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?                                                                                                                                          | 16a |     | No |
| b                                                                                                                   | If "Yes," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements? | 16b |     |    |

| Section C. Disclosure |                                                                                                                                                                                                                                                                                                                                                                    |
|-----------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| 17                    | List the States with which a copy of this Form 990 is required to be filed CT , NY                                                                                                                                                                                                                                                                                 |
| 18                    | Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.<br><input checked="" type="checkbox"/> Own website <input type="checkbox"/> Another's website <input checked="" type="checkbox"/> Upon request |
| 19                    | Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public. See Additional Data Table.                                                                                                                                                         |
| 20                    | State the name, physical address, and telephone number of the person who possesses the books and records of the organization.<br>TIM ARMIJO<br>ONE EDUCATION WAY<br>Colorado Springs, CO 80906<br>(719) 540-6235                                                                                                                                                   |

Check if Schedule O contains a response to any question in this Part VII ☒

☐ Check this box if neither the organization nor any related organization compensated any current officer, director, or trustee

Form **990** (2010)

## Part VII

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 in reportable compensation from the organization 18

|          |                                                                                                                                                                                                                                               |
|----------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| <b>3</b> | Did the organization list any <b>former</b> officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i> . . . . .                                        |
| <b>4</b> | For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i> . . . . . |
| <b>5</b> | Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i> . . . . .                       |

## **Section B. Independent Contractors**

| 1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization                |                                |                     |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------------------------------|---------------------|
| (A)<br>Name and business address                                                                                                                                       | (B)<br>Description of services | (C)<br>Compensation |
| SPARK AGENCY INC<br>PO BOX 790379<br>ST LOUIS, MO 63179                                                                                                                | TRANSPORT/STORAGE              | 1,110,306           |
| MOORE WALLACE INC<br>PO BOX 730165<br>DALLAS, TX 75373                                                                                                                 | STORAGE/ASSEMBLY               | 973,149             |
| ENSPIRE LEARNING<br>1708 GUADALUPE<br>AUSTIN, TX 78701                                                                                                                 | FINANCE PARK DEV'T             | 373,016             |
| ROTHGERBER JOHNSON LYONS LLP<br>1200 SEVENTEENTH ST SUITE 3000<br>DENVER, CO 80202                                                                                     | LEGAL                          | 237,618             |
| CROSSLAND GROUP LTD<br>16 MAOLIS ROAD<br>NAHANT, MA 10908                                                                                                              | STRATEGIC PLAN CNSLT           | 185,386             |
| 2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 in compensation from the organization ▶10 |                                |                     |

Part VIII

Statement of Revenue

|                                                           |                                           |                                                                                                                                      |                                                                                          |                | (A)<br>Total revenue | (B)<br>Related<br>or<br>exempt<br>function<br>revenue | (C)<br>Unrelated<br>business<br>revenue | (D)<br>Revenue<br>excluded<br>from<br>tax<br>under<br>sections<br><br>512,<br>513, or<br>514 |         |           |
|-----------------------------------------------------------|-------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------|------------------------------------------------------------------------------------------|----------------|----------------------|-------------------------------------------------------|-----------------------------------------|----------------------------------------------------------------------------------------------|---------|-----------|
| Contributions, gifts, grants<br>and other similar amounts | 1a                                        | Federated campaigns . . .                                                                                                            | 1a                                                                                       |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | b                                         | Membership dues . . . . .                                                                                                            | 1b                                                                                       |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | c                                         | Fundraising events . . . . .                                                                                                         | 1c                                                                                       |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | d                                         | Related organizations . . . . .                                                                                                      | 1d                                                                                       |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | e                                         | Government grants (contributions)                                                                                                    | 1e                                                                                       | 1,118,225      |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | f                                         | All other contributions, gifts, grants, and<br>similar amounts not included above                                                    | 1f                                                                                       | 19,903,657     |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | g                                         | Noncash contributions included in lines 1a-1f \$                                                                                     |                                                                                          |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | h                                         | Total. Add lines 1a-1f . . . . .                                                                                                     |                                                                                          |                | 21,021,882           |                                                       |                                         |                                                                                              |         |           |
|                                                           | Program Service Revenue                   |                                                                                                                                      |                                                                                          |                | Business Code        |                                                       |                                         |                                                                                              |         |           |
| 2a                                                        |                                           | AREA LICENSE FEES                                                                                                                    |                                                                                          | 611710         | 4,447,949            | 4,447,949                                             |                                         |                                                                                              |         |           |
| b                                                         |                                           |                                                                                                                                      |                                                                                          |                |                      |                                                       |                                         |                                                                                              |         |           |
| c                                                         |                                           |                                                                                                                                      |                                                                                          |                |                      |                                                       |                                         |                                                                                              |         |           |
| d                                                         |                                           |                                                                                                                                      |                                                                                          |                |                      |                                                       |                                         |                                                                                              |         |           |
| e                                                         |                                           |                                                                                                                                      |                                                                                          |                |                      |                                                       |                                         |                                                                                              |         |           |
| f                                                         |                                           | All other program service revenue                                                                                                    |                                                                                          |                |                      |                                                       |                                         |                                                                                              |         |           |
| g                                                         |                                           | Total. Add lines 2a-2f . . . . .                                                                                                     |                                                                                          |                | 4,447,949            |                                                       |                                         |                                                                                              |         |           |
| Other Revenue                                             |                                           | 3                                                                                                                                    | Investment income (including dividends, interest<br>and other similar amounts) . . . . . |                |                      | 196,152                                               |                                         |                                                                                              | 196,152 |           |
|                                                           | 4                                         | Income from investment of tax-exempt bond proceeds . .                                                                               |                                                                                          |                | 0                    |                                                       |                                         |                                                                                              |         |           |
|                                                           | 5                                         | Royalties . . . . .                                                                                                                  |                                                                                          |                | 0                    |                                                       |                                         |                                                                                              |         |           |
|                                                           | 6a                                        | Gross Rents                                                                                                                          |                                                                                          | (i) Real       | (ii) Personal        |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | b                                                                                                                                    | Less rental expenses                                                                     |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | c                                                                                                                                    | Rental income or (loss)                                                                  |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | d                                                                                                                                    | Net rental income or (loss) . . . . .                                                    |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | 7a                                        | Gross amount from sales of assets other than inventory                                                                               |                                                                                          | (i) Securities | (ii) Other           |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | b                                                                                                                                    | Less cost or other basis and sales expenses                                              |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | c                                                                                                                                    | Gain or (loss)                                                                           |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | d                                                                                                                                    | Net gain or (loss) . . . . .                                                             |                | 23,333               |                                                       |                                         |                                                                                              |         | 23,333    |
|                                                           | 8a                                        | Gross income from fundraising events (not including \$ _____ of contributions reported on line 1c)<br>See Part IV, line 18 . . . . . |                                                                                          |                | a                    |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | b                                                                                                                                    | Less direct expenses . . . . .                                                           | b              |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | c                                                                                                                                    | Net income or (loss) from fundraising events . .                                         |                | 0                    |                                                       |                                         |                                                                                              |         |           |
|                                                           | 9a                                        | Gross income from gaming activities See Part IV, line 19 . .                                                                         |                                                                                          |                | a                    |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | b                                                                                                                                    | Less direct expenses . . . . .                                                           | b              |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | c                                                                                                                                    | Net income or (loss) from gaming activities . .                                          |                | 0                    |                                                       |                                         |                                                                                              |         |           |
|                                                           | 10a                                       | Gross sales of inventory, less returns and allowances . .                                                                            |                                                                                          |                | a                    |                                                       |                                         |                                                                                              |         |           |
|                                                           |                                           | b                                                                                                                                    | Less cost of goods sold . . . . .                                                        | b              | 12,705,475           |                                                       |                                         |                                                                                              |         | 4,732,803 |
|                                                           |                                           | c                                                                                                                                    | Net income or (loss) from sales of inventory . .                                         |                | 7,972,672            |                                                       |                                         |                                                                                              |         | 7,972,672 |
| Miscellaneous Revenue                                     |                                           |                                                                                                                                      |                                                                                          | Business Code  |                      |                                                       |                                         |                                                                                              |         |           |
| 11a                                                       | MISCELLANEOUS                             |                                                                                                                                      |                                                                                          | 900099         | 166,208              | 166,208                                               |                                         |                                                                                              |         |           |
|                                                           | b                                         |                                                                                                                                      |                                                                                          |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | c                                         |                                                                                                                                      |                                                                                          |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | d                                         | All other revenue . . . . .                                                                                                          |                                                                                          |                |                      |                                                       |                                         |                                                                                              |         |           |
|                                                           | e                                         | Total. Add lines 11a-11d . . . . .                                                                                                   |                                                                                          |                | 166,208              |                                                       |                                         |                                                                                              |         |           |
| 12                                                        | Total revenue. See Instructions . . . . . |                                                                                                                                      |                                                                                          | 33,828,196     | 12,586,829           |                                                       | 219,485                                 |                                                                                              |         |           |

Part IX

Statement of Functional Expenses

Section 501(c)(3) and 501(c)(4) organizations must complete all columns.

All other organizations must complete column (A) but are not required to complete columns (B), (C), and (D).

| Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII. |                                                                                                                                                                                                                                                  | (A)<br>Total expenses | (B)<br>Program service expenses | (C)<br>Management and general expenses | (D)<br>Fundraising expenses |
|--------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----------------------|---------------------------------|----------------------------------------|-----------------------------|
| 1                                                                              | Grants and other assistance to governments and organizations in the U S See Part IV, line 21                                                                                                                                                     | 4,570,064             | 4,570,064                       |                                        |                             |
| 2                                                                              | Grants and other assistance to individuals in the U S See Part IV, line 22                                                                                                                                                                       | 0                     |                                 |                                        |                             |
| 3                                                                              | Grants and other assistance to governments, organizations, and individuals outside the U S See Part IV, lines 15 and 16                                                                                                                          | 6,424,735             | 6,424,735                       |                                        |                             |
| 4                                                                              | Benefits paid to or for members                                                                                                                                                                                                                  | 0                     |                                 |                                        |                             |
| 5                                                                              | Compensation of current officers, directors, trustees, and key employees . . . . .                                                                                                                                                               | 2,561,275             | 1,815,752                       | 595,497                                | 150,026                     |
| 6                                                                              | Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B) . . . . .                                                                                          | 0                     |                                 |                                        |                             |
| 7                                                                              | Other salaries and wages                                                                                                                                                                                                                         | 5,932,578             | 4,200,265                       | 1,364,493                              | 367,820                     |
| 8                                                                              | Pension plan contributions (include section 401(k) and section 403(b) employer contributions) . . . . .                                                                                                                                          | 224,637               | 160,074                         | 54,454                                 | 10,109                      |
| 9                                                                              | Other employee benefits . . . . .                                                                                                                                                                                                                | 775,949               | 552,933                         | 188,098                                | 34,918                      |
| 10                                                                             | Payroll taxes . . . . .                                                                                                                                                                                                                          | 500,883               | 356,924                         | 121,419                                | 22,540                      |
| a                                                                              | Fees for services (non-employees) Management . . . . .                                                                                                                                                                                           | 119,117               | 0                               | 106,014                                | 13,103                      |
| b                                                                              | Legal . . . . .                                                                                                                                                                                                                                  | 471,829               | 117,957                         | 353,872                                | 0                           |
| c                                                                              | Accounting . . . . .                                                                                                                                                                                                                             | 113,575               | 28,394                          | 85,181                                 | 0                           |
| d                                                                              | Lobbying . . . . .                                                                                                                                                                                                                               | 164,990               | 148,491                         | 16,499                                 | 0                           |
| e                                                                              | Professional fundraising services See Part IV, line 17 . . . . .                                                                                                                                                                                 | 0                     |                                 |                                        |                             |
| f                                                                              | Investment management fees . . . . .                                                                                                                                                                                                             | 0                     |                                 |                                        |                             |
| g                                                                              | Other . . . . .                                                                                                                                                                                                                                  | 199,480               | 143,067                         | 34,710                                 | 21,703                      |
| 12                                                                             | Advertising and promotion . . . . .                                                                                                                                                                                                              | 1,321,768             | 938,455                         | 132,177                                | 251,136                     |
| 13                                                                             | Office expenses . . . . .                                                                                                                                                                                                                        | 685,977               | 548,781                         | 96,037                                 | 41,159                      |
| 14                                                                             | Information technology . . . . .                                                                                                                                                                                                                 | 1,342,218             | 1,114,041                       | 174,488                                | 53,689                      |
| 15                                                                             | Royalties . . . . .                                                                                                                                                                                                                              | 0                     |                                 |                                        |                             |
| 16                                                                             | Occupancy . . . . .                                                                                                                                                                                                                              | 680,740               | 445,204                         | 203,541                                | 31,995                      |
| 17                                                                             | Travel . . . . .                                                                                                                                                                                                                                 | 1,011,535             | 758,399                         | 182,076                                | 71,060                      |
| 18                                                                             | Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .                                                                                                                                         | 0                     |                                 |                                        |                             |
| 19                                                                             | Conferences, conventions, and meetings . . . . .                                                                                                                                                                                                 | 1,134,733             | 930,481                         | 147,515                                | 56,737                      |
| 20                                                                             | Interest . . . . .                                                                                                                                                                                                                               | 34,895                | 0                               | 34,895                                 | 0                           |
| 21                                                                             | Payments to affiliates . . . . .                                                                                                                                                                                                                 | 0                     |                                 |                                        |                             |
| 22                                                                             | Depreciation, depletion, and amortization . . . . .                                                                                                                                                                                              | 1,582,752             | 1,171,870                       | 309,586                                | 101,296                     |
| 23                                                                             | Insurance . . . . .                                                                                                                                                                                                                              | 0                     |                                 |                                        |                             |
| 24                                                                             | Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24f If line 24f amount exceeds 10% of line 25, column (A) amount, list line 24f expenses on Schedule O )                                                  |                       |                                 |                                        |                             |
| a                                                                              | AREA SERVICE                                                                                                                                                                                                                                     | 3,204,008             | 2,947,687                       | 256,321                                | 0                           |
| b                                                                              | R&D                                                                                                                                                                                                                                              | 1,426,059             | 1,213,163                       | 212,896                                | 0                           |
| c                                                                              | FUNDRAISING EXPENSE                                                                                                                                                                                                                              | 304,664               | 0                               | 0                                      | 304,664                     |
| d                                                                              |                                                                                                                                                                                                                                                  |                       |                                 |                                        |                             |
| e                                                                              |                                                                                                                                                                                                                                                  |                       |                                 |                                        |                             |
| f                                                                              | All other expenses                                                                                                                                                                                                                               |                       |                                 |                                        |                             |
| 25                                                                             | Total functional expenses. Add lines 1 through 24f                                                                                                                                                                                               | 34,788,461            | 28,586,737                      | 4,669,769                              | 1,531,955                   |
| 26                                                                             | Joint costs. Check here <input checked="" type="checkbox"/> if following SOP 98-2 (ASC 958-720) Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation |                       |                                 |                                        |                             |

Part X

Balance Sheet

|                             |                                                                                                                                           |                                                                                                                                                                                                                                                                                                     |     |            |  | (A)               |     | (B)         |
|-----------------------------|-------------------------------------------------------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|------------|--|-------------------|-----|-------------|
|                             |                                                                                                                                           |                                                                                                                                                                                                                                                                                                     |     |            |  | Beginning of year |     | End of year |
| Assets                      | 1                                                                                                                                         | Cash—non-interest-bearing . . . . .                                                                                                                                                                                                                                                                 |     |            |  | 3,993,921         | 1   | 5,771,490   |
|                             | 2                                                                                                                                         | Savings and temporary cash investments . . . . .                                                                                                                                                                                                                                                    |     |            |  | 619,628           | 2   | 2,007,029   |
|                             | 3                                                                                                                                         | Pledges and grants receivable, net . . . . .                                                                                                                                                                                                                                                        |     |            |  | 2,566,514         | 3   | 2,610,964   |
|                             | 4                                                                                                                                         | Accounts receivable, net . . . . .                                                                                                                                                                                                                                                                  |     |            |  | 1,574,012         | 4   | 1,170,993   |
|                             | 5                                                                                                                                         | Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L . . . . .                                                                                                                                        |     |            |  |                   | 5   |             |
|                             | 6                                                                                                                                         | Receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers, and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Schedule L . . . . . |     |            |  |                   | 6   |             |
|                             | 7                                                                                                                                         | Notes and loans receivable, net . . . . .                                                                                                                                                                                                                                                           |     |            |  |                   | 7   |             |
|                             | 8                                                                                                                                         | Inventories for sale or use . . . . .                                                                                                                                                                                                                                                               |     |            |  | 4,676,082         | 8   | 2,426,121   |
|                             | 9                                                                                                                                         | Prepaid expenses and deferred charges . . . . .                                                                                                                                                                                                                                                     |     |            |  | 203,412           | 9   | 211,693     |
|                             | 10a                                                                                                                                       | Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D                                                                                                                                                                                                                   | 10a | 13,496,769 |  |                   |     |             |
|                             | b                                                                                                                                         | Less accumulated depreciation . . . . .                                                                                                                                                                                                                                                             | 10b | 10,203,454 |  | 4,861,163         | 10c | 3,293,315   |
|                             | 11                                                                                                                                        | Investments—publicly traded securities . . . . .                                                                                                                                                                                                                                                    |     |            |  | 6,322,607         | 11  | 8,241,964   |
|                             | 12                                                                                                                                        | Investments—other securities See Part IV, line 11 . . . . .                                                                                                                                                                                                                                         |     |            |  |                   | 12  |             |
|                             | 13                                                                                                                                        | Investments—program-related See Part IV, line 11 . . . . .                                                                                                                                                                                                                                          |     |            |  |                   | 13  |             |
|                             | 14                                                                                                                                        | Intangible assets . . . . .                                                                                                                                                                                                                                                                         |     |            |  |                   | 14  |             |
|                             | 15                                                                                                                                        | Other assets See Part IV, line 11 . . . . .                                                                                                                                                                                                                                                         |     |            |  |                   | 15  |             |
|                             | 16                                                                                                                                        | Total assets. Add lines 1 through 15 (must equal line 34) . . . . .                                                                                                                                                                                                                                 |     |            |  | 24,817,339        | 16  | 25,733,569  |
| Liabilities                 | 17                                                                                                                                        | Accounts payable and accrued expenses . . . . .                                                                                                                                                                                                                                                     |     |            |  | 4,034,890         | 17  | 4,238,999   |
|                             | 18                                                                                                                                        | Grants payable . . . . .                                                                                                                                                                                                                                                                            |     |            |  |                   | 18  |             |
|                             | 19                                                                                                                                        | Deferred revenue . . . . .                                                                                                                                                                                                                                                                          |     |            |  | 87,399            | 19  | 113,125     |
|                             | 20                                                                                                                                        | Tax-exempt bond liabilities . . . . .                                                                                                                                                                                                                                                               |     |            |  |                   | 20  |             |
|                             | 21                                                                                                                                        | Escrow or custodial account liability Complete Part IV of Schedule D . . . . .                                                                                                                                                                                                                      |     |            |  | 4,083,942         | 21  | 5,130,215   |
|                             | 22                                                                                                                                        | Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L . . . . .                                                                                                                       |     |            |  |                   | 22  |             |
|                             | 23                                                                                                                                        | Secured mortgages and notes payable to unrelated third parties . . . . .                                                                                                                                                                                                                            |     |            |  | 555,295           | 23  | 424,888     |
|                             | 24                                                                                                                                        | Unsecured notes and loans payable to unrelated third parties . . . . .                                                                                                                                                                                                                              |     |            |  |                   | 24  |             |
|                             | 25                                                                                                                                        | Other liabilities Complete Part X of Schedule D . . . . .                                                                                                                                                                                                                                           |     |            |  |                   | 25  |             |
|                             | 26                                                                                                                                        | Total liabilities. Add lines 17 through 25 . . . . .                                                                                                                                                                                                                                                |     |            |  | 8,761,526         | 26  | 9,907,227   |
| Net Assets or Fund Balances | Organizations that follow SFAS 117, check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34. |                                                                                                                                                                                                                                                                                                     |     |            |  |                   |     |             |
|                             | 27                                                                                                                                        | Unrestricted net assets . . . . .                                                                                                                                                                                                                                                                   |     |            |  | 7,469,150         | 27  | 7,711,908   |
|                             | 28                                                                                                                                        | Temporarily restricted net assets . . . . .                                                                                                                                                                                                                                                         |     |            |  | 8,586,663         | 28  | 8,114,434   |
|                             | 29                                                                                                                                        | Permanently restricted net assets . . . . .                                                                                                                                                                                                                                                         |     |            |  |                   | 29  |             |
|                             | Organizations that do not follow SFAS 117, check here <input type="checkbox"/> and complete lines 30 through 34.                          |                                                                                                                                                                                                                                                                                                     |     |            |  |                   |     |             |
|                             | 30                                                                                                                                        | Capital stock or trust principal, or current funds . . . . .                                                                                                                                                                                                                                        |     |            |  |                   | 30  |             |
|                             | 31                                                                                                                                        | Paid-in or capital surplus, or land, building or equipment fund . . . . .                                                                                                                                                                                                                           |     |            |  |                   | 31  |             |
|                             | 32                                                                                                                                        | Retained earnings, endowment, accumulated income, or other funds . . . . .                                                                                                                                                                                                                          |     |            |  |                   | 32  |             |
|                             | 33                                                                                                                                        | Total net assets or fund balances . . . . .                                                                                                                                                                                                                                                         |     |            |  | 16,055,813        | 33  | 15,826,342  |
|                             | 34                                                                                                                                        | Total liabilities and net assets/fund balances . . . . .                                                                                                                                                                                                                                            |     |            |  | 24,817,339        | 34  | 25,733,569  |

**Part XI**    **Reconciliation of Net Assets**

Check if Schedule O contains a response to any question in this Part XI . . . . . ☒

|          |                                                                                                                         |          |            |
|----------|-------------------------------------------------------------------------------------------------------------------------|----------|------------|
| <b>1</b> | Total revenue (must equal Part VIII, column (A), line 12) . . . . .                                                     | <b>1</b> | 33,828,196 |
| <b>2</b> | Total expenses (must equal Part IX, column (A), line 25) . . . . .                                                      | <b>2</b> | 34,788,461 |
| <b>3</b> | Revenue less expenses Subtract line 2 from line 1 . . . . .                                                             | <b>3</b> | -960,265   |
| <b>4</b> | Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) . . . . .                     | <b>4</b> | 16,055,813 |
| <b>5</b> | Other changes in net assets or fund balances (explain in Schedule O) . . . . .                                          | <b>5</b> | 730,794    |
| <b>6</b> | Net assets or fund balances at end of year Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B)) . . . . . | <b>6</b> | 15,826,342 |

**Part XII**    **Financial Statements and Reporting**

Check if Schedule O contains a response to any question in this Part XII . . . . . ☐

|           |                                                                                                                                                                                                                                                                                                                                                            | Yes | No |
|-----------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|
| <b>1</b>  | Accounting method used to prepare the Form 990 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> Other _____<br>If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O                                                                          |     |    |
| <b>2a</b> | Were the organization's financial statements compiled or reviewed by an independent accountant? . . . . .                                                                                                                                                                                                                                                  |     | No |
| <b>b</b>  | Were the organization's financial statements audited by an independent accountant? . . . . .                                                                                                                                                                                                                                                               | Yes |    |
| <b>c</b>  | If "Yes," to 2a or 2b, does the organization have a committee that assumes responsibility for oversight of the audit, review, or compilation of its financial statements and selection of an independent accountant?<br>If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O . . . . . | Yes |    |
| <b>d</b>  | If "Yes" to line 2a or 2b, check a box below to indicate whether the financial statements for the year were issued on a separate basis, consolidated basis, or both<br><input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separated basis                       |     |    |
| <b>3a</b> | As a result of a federal award, was the organization required to undergo an audit or audits as set forth in the Single Audit Act and OMB Circular A-133? . . . . .                                                                                                                                                                                         | Yes |    |
| <b>b</b>  | If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits . . . . .                                                                                                                             | Yes |    |

SCHEDULE A  
(Form 990 or 990EZ)

Department of the Treasury  
Internal Revenue Service

Public Charity Status and Public Support

Complete if the organization is a section 501(c)(3) organization or a section 4947(a)(1) nonexempt charitable trust.

► Attach to Form 990 or Form 990-EZ. ► See separate instructions.

OMB No 1545-0047

2010

Open to Public Inspection

Name of the organization  
Junior Achievement USA

Employer identification number  
84-1267604

Part I

Reason for Public Charity Status (All organizations must complete this part.) See instructions

The organization is not a private foundation because it is (For lines 1 through 11, check only one box )

1

☐

A church, convention of churches, or association of churches described in **section 170(b)(1)(A)(i).**

2

☐

A school described in **section 170(b)(1)(A)(ii).** (Attach Schedule E )

3

☐

A hospital or a cooperative hospital service organization described in **section 170(b)(1)(A)(iii).**

4

☐

A medical research organization operated in conjunction with a hospital described in **section 170(b)(1)(A)(iii).** Enter the hospital's name, city, and state

5

☐

An organization operated for the benefit of a college or university owned or operated by a governmental unit described in **section 170(b)(1)(A)(iv).** (Complete Part II )

6

☐

A federal, state, or local government or governmental unit described in **section 170(b)(1)(A)(v).**

7

☒

An organization that normally receives a substantial part of its support from a governmental unit or from the general public described in **section 170(b)(1)(A)(vi)** (Complete Part II )

8

☐

A community trust described in **section 170(b)(1)(A)(vi)** (Complete Part II )

9

☐

An organization that normally receives (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions—subject to certain exceptions, and (2) no more than 33 1/3% of its support from gross investment income and unrelated business taxable income (less section 511 tax) from businesses acquired by the organization after June 30, 1975 See **section 509(a)(2).** (Complete Part III )

10

☐

An organization organized and operated exclusively to test for public safety See**section 509(a)(4).**

11

☐

An organization organized and operated exclusively for the benefit of, to perform the functions of, or to carry out the purposes of one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2) See **section 509(a)(3).** Check the box that describes the type of supporting organization and complete lines 11e through 11h

a

☐

Type I

b

☐

Type II

c

☐

Type III - Functionally integrated

d

☐

Type III - Other

e

☐

By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2)

f

☐

If the organization received a written determination from the IRS that it is a Type I, Type II or Type III supporting organization, check this box

g

☐

Since August 17, 2006, has the organization accepted any gift or contribution from any of the following persons?  
(i) a person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the the supported organization?  
(ii) a family member of a person described in (i) above?  
(iii) a 35% controlled entity of a person described in (i) or (ii) above?

h

☐

Provide the following information about the supported organization(s)

|          | Yes | No |
|----------|-----|----|
| 11g(i)   |     |    |
| 11g(ii)  |     |    |
| 11g(iii) |     |    |

| (i)<br>Name of supported organization | (ii)<br>EIN | (iii)<br>Type of organization (described on lines 1- 9 above or IRC section (see instructions)) | (iv)<br>Is the organization in col (i) listed in your governing document? |    | (v)<br>Did you notify the organization in col (i) of your support? |    | (vi)<br>Is the organization in col (i) organized in the U S ? |    | (vii)<br>Amount of support |
|---------------------------------------|-------------|-------------------------------------------------------------------------------------------------|---------------------------------------------------------------------------|----|--------------------------------------------------------------------|----|---------------------------------------------------------------|----|----------------------------|
|                                       |             |                                                                                                 | Yes                                                                       | No | Yes                                                                | No | Yes                                                           | No |                            |
|                                       |             |                                                                                                 |                                                                           |    |                                                                    |    |                                                               |    |                            |
|                                       |             |                                                                                                 |                                                                           |    |                                                                    |    |                                                               |    |                            |
|                                       |             |                                                                                                 |                                                                           |    |                                                                    |    |                                                               |    |                            |
|                                       |             |                                                                                                 |                                                                           |    |                                                                    |    |                                                               |    |                            |
|                                       |             |                                                                                                 |                                                                           |    |                                                                    |    |                                                               |    |                            |
|                                       |             |                                                                                                 |                                                                           |    |                                                                    |    |                                                               |    |                            |
| Total                                 |             |                                                                                                 |                                                                           |    |                                                                    |    |                                                               |    |                            |

Part II

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)

(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

| Section A. Public Support                                                                                                                                                                             |            |            |            |            |            |             |
|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|------------|------------|------------|------------|-------------|
| Calendar year (or fiscal year beginning in) ▶                                                                                                                                                         | (a) 2006   | (b) 2007   | (c) 2008   | (d) 2009   | (e) 2010   | (f) Total   |
| 1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")                                                                                                   | 24,460,706 | 21,972,721 | 22,321,320 | 22,132,445 | 21,021,882 | 111,909,074 |
| 2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf                                                                                                     |            |            |            |            |            |             |
| 3 The value of services or facilities furnished by a governmental unit to the organization without charge                                                                                             |            |            |            |            |            |             |
| 4 Total. Add lines 1 through 3                                                                                                                                                                        | 24,460,706 | 21,972,721 | 22,321,320 | 22,132,445 | 21,021,882 | 111,909,074 |
| 5 The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f) |            |            |            |            |            | 33,082,593  |
| 6 Public Support. Subtract line 5 from line 4                                                                                                                                                         |            |            |            |            |            | 78,826,481  |

| Section B. Total Support                                                                                                                                                  |            |            |            |            |            |             |
|---------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------|------------|------------|------------|------------|-------------|
| Calendar year (or fiscal year beginning in) ▶                                                                                                                             | (a) 2006   | (b) 2007   | (c) 2008   | (d) 2009   | (e) 2010   | (f) Total   |
| 7 Amounts from line 4                                                                                                                                                     | 24,460,706 | 21,972,721 | 22,321,320 | 22,132,445 | 21,021,882 | 111,909,074 |
| 8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources                                          | 294,550    | 237,802    | 238,139    | 222,245    | 196,152    | 1,188,888   |
| 9 Net income from unrelated business activities, whether or not the business is regularly carried on                                                                      |            |            |            |            |            |             |
| 10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV )                                                                         |            |            |            |            |            |             |
| 11 Total support (Add lines 7 through 10)                                                                                                                                 |            |            |            |            |            | 113,097,962 |
| 12 Gross receipts from related activities, etc (See instructions )                                                                                                        |            |            |            |            | 12         | 89,587,915  |
| 13 First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a 501(c)(3) organization, check this box and stop here ▶ |            |            |            |            |            |             |

| Section C. Computation of Public Support Percentage                                                                                                                                                                                                                                                                                                                                          |    |          |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|----------|
| 14 Public Support Percentage for 2010 (line 6 column (f) divided by line 11 column (f))                                                                                                                                                                                                                                                                                                      | 14 | 69 698 % |
| 15 Public Support Percentage for 2009 Schedule A, Part II, line 14                                                                                                                                                                                                                                                                                                                           | 15 | 77 396 % |
| 16a 33 1/3% support test—2010. If the organization did not check the box on line 13, and line 14 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶                                                                                                                                                                         |    |          |
| b 33 1/3% support test—2009. If the organization did not check the box on line 13 or 16a, and line 15 is 33 1/3% or more, check this box and stop here. The organization qualifies as a publicly supported organization ▶                                                                                                                                                                    |    |          |
| 17a 10%-facts-and-circumstances test—2010. If the organization did not check a box on line 13, 16a, or 16b and line 14 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization ▶    |    |          |
| b 10%-facts-and-circumstances test—2009. If the organization did not check a box on line 13, 16a, 16b, or 17a and line 15 is 10% or more, and if the organization meets the "facts and circumstances" test, check this box and stop here. Explain in Part IV how the organization meets the "facts and circumstances" test The organization qualifies as a publicly supported organization ▶ |    |          |
| 18 Private Foundation If the organization did not check a box on line 13, 16a, 16b, 17a or 17b, check this box and see instructions ▶                                                                                                                                                                                                                                                        |    |          |

Part IIIPart III

Support Schedule for Organizations Described in Section 509(a)(2)  
(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

| Section A. Public Support                                                                                                                                                  |          |          |          |          |          |           |
|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| Calendar year (or fiscal year beginning in) ▶                                                                                                                              | (a) 2006 | (b) 2007 | (c) 2008 | (d) 2009 | (e) 2010 | (f) Total |
| 1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants ")                                                                        |          |          |          |          |          |           |
| 2 Gross receipts from admissions, merchandise sold or services performed, or facilities furnished in any activity that is related to the organization's tax-exempt purpose |          |          |          |          |          |           |
| 3 Gross receipts from activities that are not an unrelated trade or business under section 513                                                                             |          |          |          |          |          |           |
| 4 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf                                                                          |          |          |          |          |          |           |
| 5 The value of services or facilities furnished by a governmental unit to the organization without charge                                                                  |          |          |          |          |          |           |
| 6 Total. Add lines 1 through 5                                                                                                                                             |          |          |          |          |          |           |
| 7a Amounts included on lines 1, 2, and 3 received from disqualified persons                                                                                                |          |          |          |          |          |           |
| b Amounts included on lines 2 and 3 received from other than disqualified persons that exceed the greater of \$5,000 or 1% of the amount on line 13 for the year           |          |          |          |          |          |           |
| c Add lines 7a and 7b                                                                                                                                                      |          |          |          |          |          |           |
| 8 Public Support (Subtract line 7c from line 6 )                                                                                                                           |          |          |          |          |          |           |

| Section B. Total Support                                                                                                                                                       |          |          |          |          |          |           |
|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------|----------|----------|----------|----------|-----------|
| Calendar year (or fiscal year beginning in)                                                                                                                                    | (a) 2006 | (b) 2007 | (c) 2008 | (d) 2009 | (e) 2010 | (f) Total |
| 9 Amounts from line 6                                                                                                                                                          |          |          |          |          |          |           |
| 10a Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources                                             |          |          |          |          |          |           |
| b Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975                                                                      |          |          |          |          |          |           |
| c Add lines 10a and 10b                                                                                                                                                        |          |          |          |          |          |           |
| 11 Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on                                                 |          |          |          |          |          |           |
| 12 Other income Do not include gain or loss from the sale of capital assets (Explain in Part IV )                                                                              |          |          |          |          |          |           |
| 13 Total support (Add lines 9, 10c, 11 and 12 )                                                                                                                                |          |          |          |          |          |           |
| 14 First Five Years If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section501(c)(3) organization, check this box and stop here |          |          |          |          |          |           |

| Section C. Computation of Public Support Percentage |                                                                                      |    |  |
|-----------------------------------------------------|--------------------------------------------------------------------------------------|----|--|
| 15                                                  | Public Support Percentage for 2010 (line 8 column (f) divided by line 13 column (f)) | 15 |  |
| 16                                                  | Public support percentage from 2009 Schedule A, Part III, line 15                    | 16 |  |

| Section D. Computation of Investment Income Percentage |                                                                                                                                                                                                                                                                            |    |  |
|--------------------------------------------------------|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----|--|
| 17                                                     | Investment income percentage for <b>2010</b> (line 10c column (f) divided by line 13 column (f))                                                                                                                                                                           | 17 |  |
| 18                                                     | Investment income percentage from <b>2009</b> Schedule A, Part III, line 17                                                                                                                                                                                                | 18 |  |
| 19a                                                    | 33 1/3% support tests—2010. If the organization did not check the box on line 14, and line 15 is more than 33 1/3% and line 17 is not more than 33 1/3%, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization ▶           |    |  |
| b                                                      | 33 1/3% support tests—2009. If the organization did not check a box on line 14 or line 19a, and line 16 is more than 33 1/3% and line 18 is not more than 33 1/3%, check this box and <b>stop here</b> . The organization qualifies as a publicly supported organization ▶ |    |  |
| 20                                                     | Private Foundation If the organization did not check a box on line 14, 19a or 19b, check this box and see instructions ▶                                                                                                                                                   |    |  |

Part IV

**Supplemental Information.** Supplemental Information. Complete this part to provide the explanations required by Part II, line 10; Part II, line 17a or 17b; and Part III, line 12. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

Additional Data

Software ID:

Software Version:

EIN: 84-1267604

Name: Junior Achievement USA

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

| (A)<br>Name and Title                    | (B)<br>Average hours per week | (C)<br>Position (check all that apply) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|------------------------------------------|-------------------------------|----------------------------------------|-----------------------|---------|--------------|------------------------------|--------|----------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                          |                               | Individual trustee or director         | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                      |                                                                           |                                                                                               |
| Ainar D Ajala Jr<br>Chair                | 20                            | X                                      |                       | X       |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Ralph de la Vega<br>Chair/Co-Chair       | 20                            | X                                      |                       | X       |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Michel De Wolf<br>Secretary              | 20                            | X                                      |                       | X       |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Don Humphreys<br>Treasurer               | 20                            | X                                      |                       | X       |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Albert E Suter<br>Director               | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Alejandro Luis Bottan<br>Director        | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Bengt Gunnarsson<br>Director             | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Carlos Morales<br>Director               | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Carole Wainaina<br>Director              | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Charity Jinya<br>Director                | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Charles H Dana<br>Director               | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Clyde D Keaton<br>Director               | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Dana Manciangli<br>Director              | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Dave Senay<br>Director                   | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| David Palenchar<br>Director              | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Desi Lopez<br>Director                   | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Ed Rapp<br>Director                      | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Edward G Galante<br>Director             | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Elwood D Howse Jr<br>Director            | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Francesco Vanni d'Archiarafi<br>Director | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Gerald M Czarnecki<br>Director           | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Graham B Spanier<br>Director             | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Hubert Danso<br>Director                 | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| James E Rutrough<br>Director             | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Jean Chawapina-Pama<br>Director          | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |

Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors

| (A)<br>Name and Title                          | (B)<br>Average hours per week | (C)<br>Position (check all that apply) |                       |         |              |                              |        | (D)<br>Reportable compensation from the organization (W-2/1099-MISC) | (E)<br>Reportable compensation from related organizations (W-2/1099-MISC) | (F)<br>Estimated amount of other compensation from the organization and related organizations |
|------------------------------------------------|-------------------------------|----------------------------------------|-----------------------|---------|--------------|------------------------------|--------|----------------------------------------------------------------------|---------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------|
|                                                |                               | Individual trustee or director         | Institutional Trustee | Officer | Key employee | Highest compensated employee | Former |                                                                      |                                                                           |                                                                                               |
| Jean-Leopold Schuybroek<br>Director            | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Jonas Prising<br>Director                      | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| John S Scheid<br>Director                      | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Jorge Luis Diaz<br>Director                    | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Jorgen M Clausen<br>Director                   | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Kristian P Moor<br>Director                    | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Larry Leva<br>Director                         | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Martin Burt<br>Director                        | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Mayu Avila<br>Director                         | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Michael Bray<br>Director                       | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Michael L Ducker<br>Director                   | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| N Justin Chinyanta<br>Director                 | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Paul C Chou<br>Director                        | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Per Moller<br>Director                         | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Peter Gbedemah<br>Director                     | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Richard Hartzell<br>Director                   | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Rob Pitfield<br>Director                       | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Robert Reeg<br>Director                        | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Rogério Patrus<br>Director                     | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Samuel A DiPiazza Jr<br>Director               | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Sheikh Khaled B Zayed S Al Nehayan<br>Director | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Simon Martin<br>Director                       | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Steve Wong<br>Director                         | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Susan B Butler<br>Director                     | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |
| Walter Loewenstern<br>Director                 | 20                            | X                                      |                       |         |              |                              |        | 0                                                                    | 0                                                                         | 0                                                                                             |

**Form 990, Part VII - Compensation of Officers, Directors, Trustees, Key Employees, Highest Compensated Employees, and Independent Contractors**

| (A)<br>Name and Title                 | (B)<br>Average<br>hours<br>per<br>week | (C)<br>Position (check all<br>that apply) |                       |         |              |                                 |        |         | (D)<br>Reportable<br>compensation<br>from the<br>organization (W-<br>2/1099-MISC) | (E)<br>Reportable<br>compensation<br>from related<br>organizations<br>(W- 2/1099-<br>MISC) | (F)<br>Estimated<br>amount of other<br>compensation<br>from the<br>organization and<br>related<br>organizations |
|---------------------------------------|----------------------------------------|-------------------------------------------|-----------------------|---------|--------------|---------------------------------|--------|---------|-----------------------------------------------------------------------------------|--------------------------------------------------------------------------------------------|-----------------------------------------------------------------------------------------------------------------|
|                                       |                                        | Individual trustee<br>or director         | Institutional Trustee | Officer | Key employee | Highest compensated<br>employee | Former |         |                                                                                   |                                                                                            |                                                                                                                 |
| William Derban<br>Director            | 2 0                                    | X                                         |                       |         |              |                                 |        | 0       | 0                                                                                 | 0                                                                                          |                                                                                                                 |
| Sean Rush<br>President & CEO          | 40 0                                   | X                                         |                       | X       |              |                                 |        | 604,209 | 0                                                                                 | 84,697                                                                                     |                                                                                                                 |
| Timothy Armijo<br>CFO                 | 40 0                                   |                                           |                       | X       |              |                                 |        | 147,317 | 0                                                                                 | 49,920                                                                                     |                                                                                                                 |
| Jack Kosakowski<br>COO                | 40 0                                   |                                           |                       | X       |              |                                 |        | 377,022 | 0                                                                                 | 96,192                                                                                     |                                                                                                                 |
| Cecil Thibodeaux<br>EVP - USA         | 40 0                                   |                                           |                       |         | X            |                                 |        | 242,869 | 0                                                                                 | 62,863                                                                                     |                                                                                                                 |
| Thomas Dewar<br>SVP - Development     | 40 0                                   |                                           |                       |         | X            |                                 |        | 233,537 | 0                                                                                 | 117,330                                                                                    |                                                                                                                 |
| John Box<br>SVP - Education           | 40 0                                   |                                           |                       |         | X            |                                 |        | 176,797 | 0                                                                                 | 46,793                                                                                     |                                                                                                                 |
| Don Crevling<br>SVP - HR              | 40 0                                   |                                           |                       |         | X            |                                 |        | 263,477 | 0                                                                                 | 58,253                                                                                     |                                                                                                                 |
| Peter Curcio<br>SVP - US O peration   | 40 0                                   |                                           |                       |         |              | X                               |        | 167,511 | 0                                                                                 | 91,086                                                                                     |                                                                                                                 |
| Linda Rimer<br>SVP - Asia Pacific     | 40 0                                   |                                           |                       |         |              | X                               |        | 226,737 | 0                                                                                 | 48,189                                                                                     |                                                                                                                 |
| Cynthia Hofman<br>SVP - Marketing     | 40 0                                   |                                           |                       |         |              | X                               |        | 121,289 | 0                                                                                 | 6,890                                                                                      |                                                                                                                 |
| Howard Bartner<br>SVP - US Operations | 40 0                                   |                                           |                       |         |              | X                               |        | 152,161 | 0                                                                                 | 72,796                                                                                     |                                                                                                                 |
| Steve Schmidt<br>SVP - US Operations  | 40 0                                   |                                           |                       |         |              | X                               |        | 150,444 | 0                                                                                 | 45,372                                                                                     |                                                                                                                 |

SCHEDULE C

(Form 990 or 990-EZ)

Department of the Treasury  
Internal Revenue Service

Political Campaign and Lobbying Activities

For Organizations Exempt From Income Tax Under section 501(c) and section 527

▶ **Complete if the organization is described below.**  
▶ **Attach to Form 990 or Form 990-EZ. ▶ See separate instructions.**

OMB No 1545-0047

2010

Open to Public  
Inspection

If the organization answered “Yes,” to Form 990, Part IV, Line 3, or Form 990-EZ, Part V, line 46 (Political Campaign Activities), then

- Section 501(c)(3) organizations Complete Parts I-A and B Do not complete Part I-C
- Section 501(c) (other than section 501(c)(3)) organizations Complete Parts I-A and C below Do not complete Part I-B
- Section 527 organizations Complete Part I-A only

If the organization answered “Yes,” to Form 990, Part IV, Line 4, or Form 990-EZ, Part VI, line 47 (Lobbying Activities), then

- Section 501(c)(3) organizations that have filed Form 5768 (election under section 501(h)) Complete Part II-A Do not complete Part II-B
- Section 501(c)(3) organizations that have NOT filed Form 5768 (election under section 501(h)) Complete Part II-B Do not complete Part II-A

If the organization answered “Yes,” to Form 990, Part IV, Line 5 (Proxy Tax) or Form 990-EZ, Part V, line 35a (Proxy Tax), then

- Section 501(c)(4), (5), or (6) organizations Complete Part III

|                                                    |                                              |
|----------------------------------------------------|----------------------------------------------|
| Name of the organization<br>Junior Achievement USA | Employer identification number<br>84-1267604 |
|----------------------------------------------------|----------------------------------------------|

Part I-A Complete if the organization is exempt under section 501(c) or is a section 527 organization.

- 1 Provide a description of the organization’s direct and indirect political campaign activities in Part IV
- 2 Political expenditures ▶ \$
- 3 Volunteer hours

Part I-B Complete if the organization is exempt under section 501(c)(3).

- 1 Enter the amount of any excise tax incurred by the organization under section 4955 ▶ \$
- 2 Enter the amount of any excise tax incurred by organization managers under section 4955 ▶ \$
- 3 If the organization incurred a section 4955 tax, did it file Form 4720 for this year? ☐ Yes ☐ No
- 4a Was a correction made? ☐ Yes ☐ No
- b If “Yes,” describe in Part IV

Part I-C Complete if the organization is exempt under section 501(c) except section 501(c)(3).

- 1 Enter the amount directly expended by the filing organization for section 527 exempt function activities ▶ \$
- 2 Enter the amount of the filing organization's funds contributed to other organizations for section 527 exempt function activities ▶ \$
- 3 Total exempt function expenditures Add lines 1 and 2 Enter here and on Form 1120-POL, line 17b ▶ \$
- 4 Did the filing organization file **Form 1120-POL** for this year? ☐ Yes ☐ No
- 5 Enter the names, addresses and employer identification number (EIN) of all section 527 political organizations to which the filing organization made payments For each organization listed, enter the amount paid from the filing organization’s funds Also enter the amount of political contributions received that were promptly and directly delivered to a separate political organization, such as a separate segregated fund or a political action committee (PAC) If additional space is needed, provide information in Part IV

| (a) Name | (b) Address | (c) EIN | (d) Amount paid from filing organization's funds If none, enter -0- | (e) Amount of political contributions received and promptly and directly delivered to a separate political organization If none, enter -0- |
|----------|-------------|---------|---------------------------------------------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------|
|          |             |         |                                                                     |                                                                                                                                            |
|          |             |         |                                                                     |                                                                                                                                            |
|          |             |         |                                                                     |                                                                                                                                            |
|          |             |         |                                                                     |                                                                                                                                            |
|          |             |         |                                                                     |                                                                                                                                            |
|          |             |         |                                                                     |                                                                                                                                            |
|          |             |         |                                                                     |                                                                                                                                            |

Part II-A

Complete if the organization is exempt under section 501(c)(3) and filed Form 5768 (election under section 501(h)).

A

Check

☐

if the filing organization belongs to an affiliated group

B

Check

☐

if the filing organization checked box A and "limited control" provisions apply

| Limits on Lobbying Expenditures<br>(The term "expenditures" means amounts paid or incurred.)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |                                                   | (a) Filing<br>Organization's<br>Totals                              | (b) Affiliated<br>Group<br>Totals  |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|---------------------------------------------------|---------------------------------------------------------------------|------------------------------------|--------------------|------------------------------|-----------------------------------------|-------------------------------------------------|-------------------------------------------|---------------------------------------------------|--------------------------------------------|--------------------------------------------------|-------------------|-------------|--|--|
| 1a Total lobbying expenditures to influence public opinion (grass roots lobbying)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      |                                                   | 0                                                                   |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| b Total lobbying expenditures to influence a legislative body (direct lobbying)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        |                                                   | 164,990                                                             |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| c Total lobbying expenditures (add lines 1a and 1b)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                   | 164,990                                                             |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| d Other exempt purpose expenditures                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                   | 34,623,471                                                          |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| e Total exempt purpose expenditures (add lines 1c and 1d)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              |                                                   | 34,788,461                                                          |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| f Lobbying nontaxable amount Enter the amount from the following table in both columns                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                 |                                                   | 1,000,000                                                           |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| <table><tr><td>If the amount on line 1e, column (a) or (b) is:</td><td>The lobbying nontaxable amount is:</td></tr><tr><td>Not over \$500,000</td><td>20% of the amount on line 1e</td></tr><tr><td>Over \$500,000 but not over \$1,000,000</td><td>\$100,000 plus 15% of the excess over \$500,000</td></tr><tr><td>Over \$1,000,000 but not over \$1,500,000</td><td>\$175,000 plus 10% of the excess over \$1,000,000</td></tr><tr><td>Over \$1,500,000 but not over \$17,000,000</td><td>\$225,000 plus 5% of the excess over \$1,500,000</td></tr><tr><td>Over \$17,000,000</td><td>\$1,000,000</td></tr></table> |                                                   | If the amount on line 1e, column (a) or (b) is:                     | The lobbying nontaxable amount is: | Not over \$500,000 | 20% of the amount on line 1e | Over \$500,000 but not over \$1,000,000 | \$100,000 plus 15% of the excess over \$500,000 | Over \$1,000,000 but not over \$1,500,000 | \$175,000 plus 10% of the excess over \$1,000,000 | Over \$1,500,000 but not over \$17,000,000 | \$225,000 plus 5% of the excess over \$1,500,000 | Over \$17,000,000 | \$1,000,000 |  |  |
| If the amount on line 1e, column (a) or (b) is:                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                        | The lobbying nontaxable amount is:                |                                                                     |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| Not over \$500,000                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                     | 20% of the amount on line 1e                      |                                                                     |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| Over \$500,000 but not over \$1,000,000                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                | \$100,000 plus 15% of the excess over \$500,000   |                                                                     |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| Over \$1,000,000 but not over \$1,500,000                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                              | \$175,000 plus 10% of the excess over \$1,000,000 |                                                                     |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| Over \$1,500,000 but not over \$17,000,000                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             | \$225,000 plus 5% of the excess over \$1,500,000  |                                                                     |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| Over \$17,000,000                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                      | \$1,000,000                                       |                                                                     |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| g Grassroots nontaxable amount (enter 25% of line 1f)                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |                                                   | 250,000                                                             |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| h Subtract line 1g from line 1a If zero or less, enter -0-                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                   |                                                                     |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| i Subtract line 1f from line 1c If zero or less, enter -0-                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                             |                                                   |                                                                     |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |
| j If there is an amount other than zero on either line 1h or line 1i, did the organization file Form 4720 reporting section 4911 tax for this year?                                                                                                                                                                                                                                                                                                                                                                                                                                                                    |                                                   | <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No |                                    |                    |                              |                                         |                                                 |                                           |                                                   |                                            |                                                  |                   |             |  |  |

4-Year Averaging Period Under Section 501(h)  
(Some organizations that made a section 501(h) election do not have to complete all of the five columns below. See the instructions for lines 2a through 2f on page 4.)

| Lobbying Expenditures During 4-Year Averaging Period         |           |           |           |           |           |
|--------------------------------------------------------------|-----------|-----------|-----------|-----------|-----------|
| Calendar year (or fiscal year beginning in)                  | (a) 2007  | (b) 2008  | (c) 2009  | (d) 2010  | (e) Total |
| 2a Lobbying non-taxable amount                               | 1,000,000 | 1,000,000 | 1,000,000 | 1,000,000 | 4,000,000 |
| b Lobbying ceiling amount<br>(150% of line 2a, column(e))    |           |           |           |           | 6,000,000 |
| c Total lobbying expenditures                                | 210,905   | 169,890   | 173,324   | 164,990   | 719,109   |
| d Grassroots non-taxable amount                              | 0         | 0         | 0         | 0         | 0         |
| e Grassroots ceiling amount<br>(150% of line 2d, column (e)) |           |           |           |           | 0         |
| f Grassroots lobbying expenditures                           | 0         | 0         | 0         | 0         | 0         |

Part II-B

Complete if the organization is exempt under section 501(c)(3) and has NOT filed Form 5768 (election under section 501(h)).

|    |                                                                                                                                                                                                                              | (a) |    | (b)    |
|----|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|-----|----|--------|
|    |                                                                                                                                                                                                                              | Yes | No | Amount |
| 1  | During the year, did the filing organization attempt to influence foreign, national, state or local legislation, including any attempt to influence public opinion on a legislative matter or referendum, through the use of |     |    |        |
| a  | Volunteers?                                                                                                                                                                                                                  |     |    |        |
| b  | Paid staff or management (include compensation in expenses reported on lines 1c through 1i)?                                                                                                                                 |     |    |        |
| c  | Media advertisements?                                                                                                                                                                                                        |     |    |        |
| d  | Mailings to members, legislators, or the public?                                                                                                                                                                             |     |    |        |
| e  | Publications, or published or broadcast statements?                                                                                                                                                                          |     |    |        |
| f  | Grants to other organizations for lobbying purposes?                                                                                                                                                                         |     |    |        |
| g  | Direct contact with legislators, their staffs, government officials, or a legislative body?                                                                                                                                  |     |    |        |
| h  | Rallies, demonstrations, seminars, conventions, speeches, lectures, or any similar means?                                                                                                                                    |     |    |        |
| i  | Other activities? If "Yes," describe in Part IV                                                                                                                                                                              |     |    |        |
| j  | Total lines 1c through 1i                                                                                                                                                                                                    |     |    |        |
| 2a | Did the activities in line 1 cause the organization to be not described in section 501(c)(3)?                                                                                                                                |     |    |        |
| b  | If "Yes," enter the amount of any tax incurred under section 4912                                                                                                                                                            |     |    |        |
| c  | If "Yes," enter the amount of any tax incurred by organization managers under section 4912                                                                                                                                   |     |    |        |
| d  | If the filing organization incurred a section 4912 tax, did it file Form 4720 for this year?                                                                                                                                 |     |    |        |

Part III-A

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6).

|   |                                                                                                  |   | Yes | No |
|---|--------------------------------------------------------------------------------------------------|---|-----|----|
| 1 | Were substantially all (90% or more) dues received nondeductible by members?                     | 1 |     |    |
| 2 | Did the organization make only in-house lobbying expenditures of \$2,000 or less?                | 2 |     |    |
| 3 | Did the organization agree to carryover lobbying and political expenditures from the prior year? | 3 |     |    |

Part III-B

Complete if the organization is exempt under section 501(c)(4), section 501(c)(5), or section 501(c)(6) if BOTH Part III-A, lines 1 and 2 are answered "No" OR if Part III-A, line 3 is answered "Yes".

|   |                                                                                                                                                                                                                                            |                |  |
|---|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|----------------|--|
| 1 | Dues, assessments and similar amounts from members                                                                                                                                                                                         | 1              |  |
| 2 | Section 162(e) non-deductible lobbying and political expenditures (do not include amounts of political expenses for which the section 527(f) tax was paid).                                                                                | 2a<br>2b<br>2c |  |
| a | Current year                                                                                                                                                                                                                               |                |  |
| b | Carryover from last year                                                                                                                                                                                                                   |                |  |
| c | Total                                                                                                                                                                                                                                      |                |  |
| 3 | Aggregate amount reported in section 6033(e)(1)(A) notices of nondeductible section 162(e) dues                                                                                                                                            | 3              |  |
| 4 | If notices were sent and the amount on line 2c exceeds the amount on line 3, what portion of the excess does the organization agree to carryover to the reasonable estimate of nondeductible lobbying and political expenditure next year? | 4              |  |
| 5 | Taxable amount of lobbying and political expenditures (see instructions)                                                                                                                                                                   | 5              |  |

Part IV

Supplemental Information

Complete this part to provide the descriptions required for Part I-A, line 1, Part I-B, line 4, Part I-C, line 5, and Part II-B, line 1i. Also, complete this part for any additional information.

| Identifier | Return Reference | Explanation |
|------------|------------------|-------------|
|------------|------------------|-------------|

SCHEDULE D  
(Form 990)

Supplemental Financial Statements

► Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 8, 9, 10, 11, or 12.  
► Attach to Form 990. ► See separate instructions.

OMB No 1545-0047

2010

Open to Public Inspection

Department of the Treasury  
Internal Revenue Service

Name of the organization  
Junior Achievement USA

Employer identification number  
84-1267604

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered "Yes" to Form 990, Part IV, line 6.

|   |                                                                                                                                                                                                                                                                                                                                        |                              |
|---|----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|------------------------------|
|   | (a) Donor advised funds                                                                                                                                                                                                                                                                                                                | (b) Funds and other accounts |
| 1 | Total number at end of year                                                                                                                                                                                                                                                                                                            |                              |
| 2 | Aggregate contributions to (during year)                                                                                                                                                                                                                                                                                               |                              |
| 3 | Aggregate grants from (during year)                                                                                                                                                                                                                                                                                                    |                              |
| 4 | Aggregate value at end of year                                                                                                                                                                                                                                                                                                         |                              |
| 5 | Did the organization inform all donors and donor advisors in writing that the assets held in donor advised funds are the organization's property, subject to the organization's exclusive legal control? <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div>                                                           |                              |
| 6 | Did the organization inform all grantees, donors, and donor advisors in writing that grant funds may be used only for charitable purposes and not for the benefit of the donor or donor advisor, or for any other purpose conferring impermissible private benefit <div><input type="checkbox"/> Yes <input type="checkbox"/> No</div> |                              |

Part II Conservation Easements. Complete if the organization answered "Yes" to Form 990, Part IV, line 7.

1

Purpose(s) of conservation easements held by the organization (check all that apply)

☐ Preservation of land for public use (e g , recreation or pleasure)

☐ Preservation of an historically importantly land area

☐ Protection of natural habitat

☐ Preservation of a certified historic structure

☐ Preservation of open space

2

Complete lines 2a–2d if the organization held a qualified conservation contribution in the form of a conservation easement on the last day of the tax year

|   |                                                                                    |
|---|------------------------------------------------------------------------------------|
|   | Held at the End of the Year                                                        |
| a | Total number of conservation easements                                             |
| b | Total acreage restricted by conservation easements                                 |
| c | Number of conservation easements on a certified historic structure included in (a) |
| d | Number of conservation easements included in (c) acquired after 8/17/06            |

3

Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the taxable year ►\_\_\_\_\_

4

Number of states where property subject to conservation easement is located ►\_\_\_\_\_

5

Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?

☐ Yes ☐ No

6

Staff and volunteer hours devoted to monitoring, inspecting and enforcing conservation easements during the year ►\_\_\_\_\_

7

Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year ►\$ \_\_\_\_\_

8

Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(i) and 170(h)(4)(B)(ii)?

☐ Yes ☐ No

9

In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements

Part III Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8.

1a

If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items

b

If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items

(i) Revenues included in Form 990, Part VIII, line 1

► \$ \_\_\_\_\_

(ii) Assets included in Form 990, Part X

► \$ \_\_\_\_\_

2

If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items

a

Revenues included in Form 990, Part VIII, line 1

► \$ \_\_\_\_\_

b

Assets included in Form 990, Part X

► \$ \_\_\_\_\_

For Privacy Act and Paperwork Reduction Act Notice, see the Intructions for Form 990

Cat No 52283D

Schedule D (Form 990) 2010

Part III

Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3

Using the organization's accession and other records, check any of the following that are a significant use of its collection items (check all that apply)

a

☐ Public exhibition

b

☐ Scholarly research

c

☐ Preservation for future generations

d

☐ Loan or exchange programs

e

☐ Other

4

Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV

5

During the year, did the organization solicit or receive donations of art, historical treasures or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection?

☐ Yes

☐ No

Part IV

Escrow and Custodial Arrangements. Complete if the organization answered "Yes" to Form 990, Part IV, line 9, or reported an amount on Form 990, Part X, line 21.

1a

Is the organization an agent, trustee, custodian or other intermediary for contributions or other assets not included on Form 990, Part X?

☐ Yes

☒ No

b

If "Yes," explain the arrangement in Part XIV and complete the following table

c

Beginning balance

d

Additions during the year

e

Distributions during the year

f

Ending balance

|    |        |
|----|--------|
|    | Amount |
| 1c |        |
| 1d |        |
| 1e |        |
| 1f |        |

2a

Did the organization include an amount on Form 990, Part X, line 21?

☒ Yes

☐ No

b

If "Yes," explain the arrangement in Part XIV

Part V

Endowment Funds. Complete if the organization answered "Yes" to Form 990, Part IV, line 10.

|                                                            | (a)Current Year | (b)Prior Year | (c)Two Years Back | (d)Three Years Back | (e)Four Years Back |
|------------------------------------------------------------|-----------------|---------------|-------------------|---------------------|--------------------|
| 1a Beginning of year balance . . . . .                     | 8,586,663       | 11,475,001    | 12,708,495        |                     |                    |
| b Contributions . . . . .                                  | 7,408,119       | 6,823,776     | 7,806,932         |                     |                    |
| c Investment earnings or losses . . . . .                  | 80,602          | 70,295        | -13,701           |                     |                    |
| d Grants or scholarships . . . . .                         |                 |               |                   |                     |                    |
| e Other expenditures for facilities and programs . . . . . | 7,960,950       | 9,782,409     | 9,026,725         |                     |                    |
| f Administrative expenses . . . . .                        |                 |               |                   |                     |                    |
| g End of year balance . . . . .                            | 8,114,434       | 8,586,663     | 11,475,001        |                     |                    |

2

Provide the estimated percentage of the year end balance held as

a

Board designated or quasi-endowment ▶ 0 %

b

Permanent endowment ▶ 0 %

c

Term endowment ▶ 100 000 %

3a

Are there endowment funds not in the possession of the organization that are held and administered for the organization by

(i) unrelated organizations . . . . .

(ii) related organizations . . . . .

b

If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?

|        |     |    |
|--------|-----|----|
|        | Yes | No |
| 3a(i)  |     | No |
| 3a(ii) |     | No |
| 3b     |     |    |

4

Describe in Part XIV the intended uses of the organization's endowment funds

Part VI

Investments—Land, Buildings, and Equipment. See Form 990, Part X, line 10.

| Description of investment                                                                    | (a) Cost or other basis (investment) | (b) Cost or other basis (other) | (c) Accumulated depreciation | (d) Book value |
|----------------------------------------------------------------------------------------------|--------------------------------------|---------------------------------|------------------------------|----------------|
| 1a Land . . . . .                                                                            |                                      | 1,260,730                       |                              | 1,260,730      |
| b Buildings . . . . .                                                                        |                                      | 4,120,471                       | 3,173,887                    | 946,584        |
| c Leasehold improvements . . . . .                                                           |                                      |                                 |                              |                |
| d Equipment . . . . .                                                                        |                                      | 1,283,518                       | 870,236                      | 413,282        |
| e Other . . . . .                                                                            |                                      | 6,832,050                       | 6,159,331                    | 672,719        |
| Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) ▶ |                                      |                                 |                              | 3,293,315      |



Part XI

Reconciliation of Change in Net Assets from Form 990 to Financial Statements

|    |                                                                                 |    |            |
|----|---------------------------------------------------------------------------------|----|------------|
| 1  | Total revenue (Form 990, Part VIII, column (A), line 12)                        | 1  | 33,828,196 |
| 2  | Total expenses (Form 990, Part IX, column (A), line 25)                         | 2  | 34,788,461 |
| 3  | Excess or (deficit) for the year Subtract line 2 from line 1                    | 3  | -960,265   |
| 4  | Net unrealized gains (losses) on investments                                    | 4  | 730,794    |
| 5  | Donated services and use of facilities                                          | 5  |            |
| 6  | Investment expenses                                                             | 6  |            |
| 7  | Prior period adjustments                                                        | 7  |            |
| 8  | Other (Describe in Part XIV)                                                    | 8  |            |
| 9  | Total adjustments (net) Add lines 4 - 8                                         | 9  | 730,794    |
| 10 | Excess or (deficit) for the year per financial statements Combine lines 3 and 9 | 10 | -229,471   |

Part XII

Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

|   |                                                                                            |    |            |
|---|--------------------------------------------------------------------------------------------|----|------------|
| 1 | Total revenue, gains, and other support per audited financial statements . . . . .         | 1  | 28,511,001 |
| 2 | Amounts included on line 1 but not on Form 990, Part VIII, line 12                         |    |            |
| a | Net unrealized gains on investments . . . . .                                              | 2a | 730,794    |
| b | Donated services and use of facilities . . . . .                                           | 2b | 214,007    |
| c | Recoveries of prior year grants . . . . .                                                  | 2c |            |
| d | Other (Describe in Part XIV) . . . . .                                                     | 2d | 4,732,803  |
| e | Add lines 2a through 2d . . . . .                                                          | 2e | 5,677,604  |
| 3 | Subtract line 2e from line 1 . . . . .                                                     | 3  | 22,833,397 |
| 4 | Amounts included on Form 990, Part VIII, line 12, but not on line 1                        |    |            |
| a | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                 | 4a |            |
| b | Other (Describe in Part XIV) . . . . .                                                     | 4b | 10,994,799 |
| c | Add lines 4a and 4b . . . . .                                                              | 4c | 10,994,799 |
| 5 | Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12 ) . . . . . | 5  | 33,828,196 |

Part XIII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

|   |                                                                                             |    |            |
|---|---------------------------------------------------------------------------------------------|----|------------|
| 1 | Total expenses and losses per audited financial statements . . . . .                        | 1  | 28,740,472 |
| 2 | Amounts included on line 1 but not on Form 990, Part IX, line 25                            |    |            |
| a | Donated services and use of facilities . . . . .                                            | 2a | 214,007    |
| b | Prior year adjustments . . . . .                                                            | 2b |            |
| c | Other losses . . . . .                                                                      | 2c |            |
| d | Other (Describe in Part XIV) . . . . .                                                      | 2d | 4,732,803  |
| e | Add lines 2a through 2d . . . . .                                                           | 2e | 4,946,810  |
| 3 | Subtract line 2e from line 1 . . . . .                                                      | 3  | 23,793,662 |
| 4 | Amounts included on Form 990, Part IX, line 25, but not on line 1:                          |    |            |
| a | Investment expenses not included on Form 990, Part VIII, line 7b . . . . .                  | 4a |            |
| b | Other (Describe in Part XIV) . . . . .                                                      | 4b | 10,994,799 |
| c | Add lines 4a and 4b . . . . .                                                               | 4c | 10,994,799 |
| 5 | Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18 ) . . . . . | 5  | 34,788,461 |

Part XIV

Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9, Part III, lines 1a and 4, Part IV, lines 1b and 2b, Part V, line 4, Part X, Part XI, line 8, Part XII, lines 2d and 4b, and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.

| Identifier           | Return Reference                                   | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                     |
|----------------------|----------------------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Part XII, Line 2d    | Other Revenue on Books Not on Return               | Cost of Goods Sold Reclassed From Expense and Netted Against Revenue 4,732,803                                                                                                                                                                                                                                                                                                                                                                  |
| Part XIII, Line 2d   | Other Expense on Books Not on Return               | Cost of Goods Sold Reclassed From Expense and Netted Against Revenue 4,732,803                                                                                                                                                                                                                                                                                                                                                                  |
| Part V, Question 4   | Intended Use of the Organization's Endowment Funds | Temporarily restricted funding and grants have been donor restricted for specific purposes or specified time frames. Restrictions are for the development of various types of curriculum after school, online programs, ethics curriculum, and personal financial literacy programs. Grants provide leadership, marketing and awareness, and scholarship awards.                                                                                |
| Part IV, Question 2b | Trust, Escrow, and Custodial Arrangements          | The Organization assists its international members around the world in setting up their own organizations to administer Junior Achievement programs. The Organization holds funds on behalf of certain international members for their U.S. expenses. These are included in cash and cash equivalents and investments on the statements of financial position and total \$4,375,715 and \$3,029,812 as of June 30, 2011 and 2010, respectively. |
| Part XII, Line 4b    | Other Revenue on Return Not on Books               | Designated Contributions to U.S. JA Offices and Member Nations Treated as Agency Transactions for Financial Statement Purposes 10,994,799                                                                                                                                                                                                                                                                                                       |
| Part XIII, Line 4b   | Other Expense on Return Not on Books               | Designated Contributions to U.S. JA Offices and Member Nations Treated as Agency Transactions for Financial Statement Purposes 10,994,799                                                                                                                                                                                                                                                                                                       |
| Part X, Line 2       | Uncertain Tax Positions                            | Management has evaluated their income tax positions under the guidance included in ASC 740. Based on their review, management has not identified any material uncertain tax positions to be recorded or disclosed in the financial statements.                                                                                                                                                                                                  |

SCHEDULE F  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Statement of Activities Outside the United States

► Complete if the organization answered "Yes" to Form 990, Part IV, line 14b, 15, or 16.  
► Attach to Form 990. ► See separate instructions.

OMB No 1545-0047

2010

Open to Public Inspection

Name of the organization  
Junior Achievement USA

Employer identification number  
  
84-1267604

Part I

General Information on Activities Outside the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 14b.

1

For grantmakers. Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . .

☒ Yes

☐ No

2

For grant makers. Describe in Part V the organization's procedures for monitoring the use of grant funds outside the United States

3

Activites per Region (Use Part V if additional space is needed )

| (a) Region                                 | (b) Number of offices in the region | (c) Number of employees or agents in region or independent contractors | (d) Activities conducted in region (by type) (e g , fundraising, program services, investments, grants to recipients located in the region) | (e) If activity listed in (d) is a program service, describe specific type of service(s) in region | (f) Total expenditures for region/investments in region |
|--------------------------------------------|-------------------------------------|------------------------------------------------------------------------|---------------------------------------------------------------------------------------------------------------------------------------------|----------------------------------------------------------------------------------------------------|---------------------------------------------------------|
| Central America and the Caribbean          |                                     |                                                                        | Grantmaking                                                                                                                                 |                                                                                                    | 255,144                                                 |
| East Asia and the Pacific                  |                                     |                                                                        | Grantmaking                                                                                                                                 |                                                                                                    | 999,807                                                 |
| Europe (Including Iceland and Greenland)   |                                     |                                                                        | Grantmaking                                                                                                                                 |                                                                                                    | 2,077,470                                               |
| Middle East and North Africa               |                                     |                                                                        | Grantmaking                                                                                                                                 |                                                                                                    | 779,731                                                 |
| North America                              |                                     |                                                                        | Grantmaking                                                                                                                                 |                                                                                                    | 308,708                                                 |
| Russia and the Newly Independent States    |                                     |                                                                        | Grantmaking                                                                                                                                 |                                                                                                    | 137,996                                                 |
| South America                              |                                     |                                                                        | Grantmaking                                                                                                                                 |                                                                                                    | 861,472                                                 |
| South Asia                                 |                                     |                                                                        | Grantmaking                                                                                                                                 |                                                                                                    | 5,000                                                   |
| Sub-Saharan Africa                         |                                     |                                                                        | Grantmaking                                                                                                                                 |                                                                                                    | 999,407                                                 |
| Europe (Including Iceland and Greenland)   |                                     |                                                                        | Fundraising                                                                                                                                 |                                                                                                    | 0                                                       |
| North America                              |                                     |                                                                        | Fundraising                                                                                                                                 |                                                                                                    | 0                                                       |
| Sub-Saharan Africa                         |                                     |                                                                        | Fundraising                                                                                                                                 |                                                                                                    | 0                                                       |
| South America                              |                                     |                                                                        | Fundraising                                                                                                                                 |                                                                                                    | 0                                                       |
| Central America and the Caribbean          |                                     |                                                                        | Program Services                                                                                                                            | ECONOMIC EDUCATION PRG                                                                             | 236,172                                                 |
| Middle East and North Africa               |                                     |                                                                        | Program Services                                                                                                                            | ECONOMIC EDUCATION PRG                                                                             | 320,062                                                 |
| Russia and the Newly Independent States    |                                     |                                                                        | Program Services                                                                                                                            | ECONOMIC EDUCATION PRG                                                                             | 146,960                                                 |
| East Asia and the Pacific                  |                                     |                                                                        | Program Services                                                                                                                            | ECONOMIC EDUCATION PRG                                                                             | 28,241                                                  |
| 3a Sub-total                               |                                     |                                                                        |                                                                                                                                             |                                                                                                    | 7,156,170                                               |
| b Total from continuation sheets to Part I |                                     |                                                                        |                                                                                                                                             |                                                                                                    |                                                         |
| c Totals (add lines 3a and 3b)             |                                     |                                                                        |                                                                                                                                             |                                                                                                    | 7,156,170                                               |

[illegible]**Schedule F (Form 990) 2010**

**Part III** **Grants and Other Assistance to Individuals Outside the United States.** Complete if the organization answered "Yes" to Form 990, Part IV, line 16.  
Use Part V if additional space is needed.

[illegible]

**Part IV Foreign Forms**

- 1

Was the organization a U S transferor of property to a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 926 (see instructions for Form 926)*

☐

Yes

☒

No
- 2

Did the organization have an interest in a foreign trust during the tax year? *If " Yes," the organization may be required to file Form 3520 and/or Form 3520-A. (see instructions for Forms 3520 and 3520-A)*

☐

Yes

☒

No
- 3

Did the organization have an ownership interest in a foreign corporation during the tax year? *If "Yes," the organization may be required to file Form 5471, Information Return of U.S. Persons with respect to Certain Foreign Corporations. (see instructions for Form 5471)*

☐

Yes

☒

No
- 4

Was the organization a direct or indirect shareholder of a passive foreign investment company or a qualified electing fund during the tax year? *If "Yes," the organization may be required to file Form 8621, Return by a Shareholder of a Passive Foreign Investment Company or Qualified Electing Fund. (see instructions for Form 8621)*

☐

Yes

☒

No
- 5

Did the organization have an ownership interest in a foreign partnership during the tax year? *If "Yes," the organization may be required to file Form 8865, Return of U.S. Persons with respect to Certain Foreign Partnerships. (see instructions for Form 8865)*

☐

Yes

☒

No
- 6

Did the organization have any operations in or related to any boycotting countries during the tax year? *If "Yes," the organization may be required to file Form 5713, International Boycott Report (see instructions for Form 5713).*

☐

Yes

☒

No

**Part V**   **Supplemental Information**

Complete this part to provide the information (see instructions) required in Part I, line 2, and any additional information.

| Identifier                                                      | Return Reference                     | Explanation                                                                                                                                                                                                                                                                               |
|-----------------------------------------------------------------|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Organization's procedures for monitoring the use of grant funds | Form 990, Sch F , Part I, Question 2 | Grants are to JA member nations only Most of the funding for the grants are provided by donors w ho place restrictions on the use of the monies Grant usage requirements varies by donor The reporting required is submitted to the organizations grant stew ard or directly to the donor |

Additional Data

Software ID:

Software Version:

EIN: 84-1267604

Name: Junior Achievement USA

Form 990 Schedule F Part II - Grants or Entities Outside The United States

| (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region               | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|--------------------------|----------------------------------------------|--------------------------|----------------------|--------------------------|---------------------------------|-----------------------------------|----------------------------------------|-------------------------------------------------------|
|                          |                                              | Cent America/Caribbean   |                      | 44,800                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Cent America/Caribbean   |                      | 8,300                    | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Cent America/Caribbean   |                      | 36,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Cent America/Caribbean   |                      | 49,300                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Cent America/Caribbean   |                      | 35,800                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 473,968                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 109,278                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 137,910                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 31,800                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 6,800                    | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 39,800                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 36,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 8,800                    | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 60,138                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 60,405                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | East Asia/Pacific        |                      | 30,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 67,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 17,500                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 50,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 30,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 30,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 10,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 41,500                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 95,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 285,000                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 96,500                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 20,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 25,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 40,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Europe/Iceland/Greenland |                      | 115,500                  | Wire Trnsfr                     |                                   |                                        |                                                       |

| (a) Name of organization | (b) IRS code section and EIN(if applicable) | (c) Region               | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|--------------------------|---------------------------------------------|--------------------------|----------------------|--------------------------|---------------------------------|-----------------------------------|----------------------------------------|-------------------------------------------------------|
|                          |                                             | Europe/Iceland/Greenland |                      | 40,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Europe/Iceland/Greenland |                      | 24,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Europe/Iceland/Greenland |                      | 49,800                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Europe/Iceland/Greenland |                      | 50,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Europe/Iceland/Greenland |                      | 82,430                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Europe/Iceland/Greenland |                      | 347,021                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Europe/Iceland/Greenland |                      | 558,719                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Middle East/North Africa |                      | 17,625                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Middle East/North Africa |                      | 140,100                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Middle East/North Africa |                      | 14,390                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Middle East/North Africa |                      | 259,125                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Middle East/North Africa |                      | 82,125                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Middle East/North Africa |                      | 117,250                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Middle East/North Africa |                      | 84,617                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Middle East/North Africa |                      | 64,500                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | North America            |                      | 150,450                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | North America            |                      | 158,258                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Russia                   |                      | 10,248                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Russia                   |                      | 38,748                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | Russia                   |                      | 85,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | South America            |                      | 58,992                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | South America            |                      | 9,555                    | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | South America            |                      | 192,538                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | South America            |                      | 59,400                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | South America            |                      | 97,500                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | South America            |                      | 27,097                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | South America            |                      | 260,052                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | South America            |                      | 71,039                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | South America            |                      | 27,312                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                             | South America            |                      | 57,988                   | Wire Trnsfr                     |                                   |                                        |                                                       |

| (a) Name of organization | (b) IRS code section and EIN (if applicable) | (c) Region             | (d) Purpose of grant | (e) Amount of cash grant | (f) Manner of cash disbursement | (g) Amount of non-cash assistance | (h) Description of non-cash assistance | (i) Method of valuation (book, FMV, appraisal, other) |
|--------------------------|----------------------------------------------|------------------------|----------------------|--------------------------|---------------------------------|-----------------------------------|----------------------------------------|-------------------------------------------------------|
|                          |                                              | Sub-Saharan Africa     |                      | 57,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 12,500                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 56,911                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 105,000                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 19,619                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 36,500                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 28,570                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 100,000                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 70,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 24,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 85,806                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 20,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 54,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 24,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 34,000                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 71,500                   | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Sub-Saharan Africa     |                      | 200,000                  | Wire Trnsfr                     |                                   |                                        |                                                       |
|                          |                                              | Cent America/Caribbean |                      | 47,800                   | WIRE TRNSFR                     |                                   |                                        |                                                       |
|                          |                                              | Cent America/Caribbean |                      | 23,000                   | WIRE TRNSFR                     |                                   |                                        |                                                       |

Schedule I  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Name of the organization  
Junior Achievement USA

Grants and Other Assistance to Organizations,  
Governments and Individuals in the United States

Complete if the organization answered "Yes," to Form 990, Part IV, line 21 or 22.  
▶ Attach to Form 990

OMB No 1545-0047

2010

Open to Public  
Inspection

Employer identification number  
84-1267604

Part I General Information on Grants and Assistance

1

Does the organization maintain records to substantiate the amount of the grants or assistance, the grantees' eligibility for the grants or assistance, and the selection criteria used to award the grants or assistance? . . . . .

☒ Yes ☐ No

2

Describe in Part IV the organization's procedures for monitoring the use of grant funds in the United States

Part II Grants and Other Assistance to Governments and Organizations in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 21 for any recipient that received more than \$5,000. Check this box if no one recipient received more than \$5,000. Part II can be duplicated if additional space is needed. . . . . ▶ ☐

| 1 (a) Name and address of organization or government | (b) EIN | (c) IRC Code section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|------------------------------------------------------|---------|------------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|------------------------------------|
| See Additional Data Table                            |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |
|                                                      |         |                                    |                          |                                   |                                                       |                                        |                                    |

2

Enter total number of section 501(c)(3) and government organizations . . . . .

86

3

Enter total number of other organizations . . . . .

0

Part III

Grants and Other Assistance to Individuals in the United States. Complete if the organization answered "Yes" to Form 990, Part IV, line 22.  
Use Schedule I-1 (Form 990) if additional space is needed.

| (a)Type of grant or assistance | (b)Number of recipients | (c)Amount of cash grant | (d)Amount of non-cash assistance | (e)Method of valuation (book, FMV, appraisal, other) | (f)Description of non-cash assistance |
|--------------------------------|-------------------------|-------------------------|----------------------------------|------------------------------------------------------|---------------------------------------|
|                                |                         |                         |                                  |                                                      |                                       |
|                                |                         |                         |                                  |                                                      |                                       |
|                                |                         |                         |                                  |                                                      |                                       |
|                                |                         |                         |                                  |                                                      |                                       |
|                                |                         |                         |                                  |                                                      |                                       |
|                                |                         |                         |                                  |                                                      |                                       |
|                                |                         |                         |                                  |                                                      |                                       |
|                                |                         |                         |                                  |                                                      |                                       |

Part IV

Supplemental Information. Complete this part to provide the information required in Part I, line 2, and any other additional information.

| Identifier                                                      | Return Reference                     | Explanation                                                                                                                                                                                                                                                                         |
|-----------------------------------------------------------------|--------------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Organization's procedures for monitoring the use of grant funds | Form 990, Sch I , Part I, Question 2 | Grants are to US JA offices only Most of the funding for the grants are provided by donors who place restrictions on the use of the monies Grant usage requirements varies by donor The reporting required is submitted to the organizations grant steward or directly to the donor |

Software ID:  
Software Version:  
EIN: 84-1267604  
Name: Junior Achievement USA

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

| (a) Name and address of organization or government                                       | (b) EIN    | (c) IRC Code section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|------------------------------------------------------------------------------------------|------------|------------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|------------------------------------|
| JA of North Central Ohio Inc<br>1200 Firestone Pky 2nd Fl<br>Akron, OH 44317             | 34-0940986 | 501(c)(3)                          | 15,778                   |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of New Mexico Inc<br>4700 Lincoln NE 108<br>Albuquerque, NM 87109     | 85-0416889 | 501(c)(3)                          | 14,400                   |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of Georgia Inc<br>460 Abernathy Road NE<br>Atlanta, GA 30328          | 58-0598050 | 501(c)(3)                          | 943,315                  |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of Central Texas Inc<br>6001 Westcreek Dr Unit G<br>Austin, TX 78749  | 74-1688335 | 501(c)(3)                          | 12,995                   |                                   |                                                       |                                        | To support the Organization        |
| JA of Greater Baton Rouge & Acadiana<br>7809 Jefferson Hwy D4<br>Baton Rouge, LA 70809   | 72-0485727 | 501(c)(3)                          | 21,620                   |                                   |                                                       |                                        | To support the Organization        |
| JA of Greater Birmingham Inc<br>216 Aquarius Dr 319<br>Birmingham, AL 35209              | 63-0340866 | 501(c)(3)                          | 56,779                   |                                   |                                                       |                                        | To support the Organization        |
| JA of Western Connecticut Inc<br>835 Main Street<br>Bridgeport, CT 06604                 | 06-0644315 | 501(c)(3)                          | 20,600                   |                                   |                                                       |                                        | To support the Organization        |
| JA of Western New York Inc<br>275 Oak Street Suite 222<br>Buffalo, NY 14203              | 16-0821488 | 501(c)(3)                          | 55,444                   |                                   |                                                       |                                        | To support the Organization        |
| JA of East Central Ohio Inc<br>4353 Executive Circle NW<br>Canton, OH 44718              | 34-0757173 | 501(c)(3)                          | 6,000                    |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of Eastern Iowa Inc<br>315 3rd Ave SE 200<br>Cedar Rapids, IA 52401   | 42-0919209 | 501(c)(3)                          | 57,742                   |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of West Virginia Inc<br>1700 MacCorkle Ave SE<br>Charleston, WV 25314 | 55-0524771 | 501(c)(3)                          | 7,030                    |                                   |                                                       |                                        | To support the Organization        |
| JA of Central Carolinas Inc<br>201 S Tryon St LL 100<br>Charlotte, NC 28202              | 56-0672085 | 501(c)(3)                          | 58,268                   |                                   |                                                       |                                        | To support the Organization        |

**Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States**

| <b>(a)</b> Name and address of organization or government                            | <b>(b)</b> EIN | <b>(c)</b> IRC Code section if applicable | <b>(d)</b> Amount of cash grant | <b>(e)</b> Amount of non-cash assistance | <b>(f)</b> Method of valuation (book, FMV, appraisal, other) | <b>(g)</b> Description of non-cash assistance | <b>(h)</b> Purpose of grant or assistance |
|--------------------------------------------------------------------------------------|----------------|-------------------------------------------|---------------------------------|------------------------------------------|--------------------------------------------------------------|-----------------------------------------------|-------------------------------------------|
| Junior Achievement of Chattanooga Inc5721 Marlin Ste 3400 Chattanooga, TN 37411      | 62-0636297     | 501(c)(3)                                 | 6,248                           |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Greater St Louis Inc17339 N Outer 40 Rd Chesterfield, MO 63005 | 43-0652112     | 501(c)(3)                                 | 114,673                         |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Chicago651 W Washington St 404 Chicago, IL 60661               | 36-2170141     | 501(c)(3)                                 | 384,297                         |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of OKI Partners Inc644 Linn St Ste 1024 Cincinnati, OH 45203      | 32-0014307     | 501(c)(3)                                 | 26,994                          |                                          |                                                              |                                               | To support the Organization               |
| JA of West Central Florida Inc13805 58th St N 2-140 Clearwater, FL 33760             | 59-1098499     | 501(c)(3)                                 | 50,785                          |                                          |                                                              |                                               | To support the Organization               |
| JA of Greater Cleveland Inc 1422 Euclid Ave Ste 525 Cleveland, OH 44115              | 34-0733164     | 501(c)(3)                                 | 34,638                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of East Tennessee Inc2135 N Charles G Seivers Clinton, TN 37716   | 62-0810145     | 501(c)(3)                                 | 16,054                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of South Florida Inc1130 Coconut Crk Blvd Coconut Crk, FL 33066   | 59-0871446     | 501(c)(3)                                 | 8,364                           |                                          |                                                              |                                               | To support the Organization               |
| JA of Central South Carolina Inc301 Greystone Boulevard Columbia, SC 29210           | 57-0511131     | 501(c)(3)                                 | 20,908                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Central Ohio Inc68 E 2nd Avenue Columbus, OH 43201             | 31-4385042     | 501(c)(3)                                 | 8,499                           |                                          |                                                              |                                               | To support the Organization               |
| JA of East Central Illinois Inc250 N Water Suite 370 Decatur, IL 62523               | 37-0762052     | 501(c)(3)                                 | 10,336                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement - Rocky Mountain Inc1445 Market Suite 200 Denver, CO 80202        | 84-0430495     | 501(c)(3)                                 | 45,758                          |                                          |                                                              |                                               | To support the Organization               |

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

| (a) Name and address of organization or government                            | (b) EIN    | (c) IRC Code section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|-------------------------------------------------------------------------------|------------|------------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|------------------------------------|
| Junior Achievement of Central Iowa Inc6100 Grand Avenue Des Moines,IA 50312   | 42-0759070 | 501(c)(3)                          | 12,200                   |                                   |                                                       |                                        | To support the Organization        |
| JA of Southeastern Michigan Inc577 E Larned Suite 200 Detroit,MI 48226        | 38-1348535 | 501(c)(3)                          | 37,207                   |                                   |                                                       |                                        | To support the Organization        |
| JA of Central New York Inc 3649 Erie Boulevard East Dewitt,NY 13214           | 16-0915560 | 501(c)(3)                          | 17,202                   |                                   |                                                       |                                        | To support the Organization        |
| JA of The Desert Southwest Inc150 S Alto Mesa Suite D El Paso,TX 79912        | 74-1565161 | 501(c)(3)                          | 6,486                    |                                   |                                                       |                                        | To support the Organization        |
| JA of Southwestern Indiana Inc233 SE 3rd St 2nd Flr Evansville,IN 47713       | 35-6048156 | 501(c)(3)                          | 8,756                    |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of Northern Indiana Inc601 Noble Drive Fort Wayne,IN 46825 | 35-0922731 | 501(c)(3)                          | 45,097                   |                                   |                                                       |                                        | To support the Organization        |
| JA of The Chisholm Trail Inc 6300 Ridglea Pl 400 Fort Worth,TX 76116          | 75-0944915 | 501(c)(3)                          | 14,265                   |                                   |                                                       |                                        | To support the Organization        |
| JA of Central N Carolina Inc 3220 Northline Avenue Greensboro,NC 27408        | 56-0844838 | 501(c)(3)                          | 14,582                   |                                   |                                                       |                                        | To support the Organization        |
| JA of Upstate South Carolina Inc530 Howell Rd Ste 103 Greenville,SC 29615     | 57-0547967 | 501(c)(3)                          | 15,036                   |                                   |                                                       |                                        | To support the Organization        |
| JA of The Michigan Great Lakes Inc2650 E BltIn SE Ste B Grnd Rpds,MI 49546    | 38-1557861 | 501(c)(3)                          | 25,166                   |                                   |                                                       |                                        | To support the Organization        |
| JA of Southwest New England Inc11 Asylum St Ste 601 Hartford,CT 06103         | 06-0665972 | 501(c)(3)                          | 68,704                   |                                   |                                                       |                                        | To support the Organization        |
| JA of Southeast Texas Inc 2115 E Governors Cir Houston,TX 77092               | 74-1153957 | 501(c)(3)                          | 87,862                   |                                   |                                                       |                                        | To support the Organization        |

**Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States**

| <b>(a)</b> Name and address of organization or government                           | <b>(b)</b> EIN | <b>(c)</b> IRC Code section if applicable | <b>(d)</b> Amount of cash grant | <b>(e)</b> Amount of non-cash assistance | <b>(f)</b> Method of valuation (book, FMV, appraisal, other) | <b>(g)</b> Description of non-cash assistance | <b>(h)</b> Purpose of grant or assistance |
|-------------------------------------------------------------------------------------|----------------|-------------------------------------------|---------------------------------|------------------------------------------|--------------------------------------------------------------|-----------------------------------------------|-------------------------------------------|
| Junior Achievement of North Alabama Inc2809 Newby Rd SW 116 Huntsville, AL 35805    | 63-0905188     | 501(c)(3)                                 | 9,152                           |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Middle America Inc4049 Pennsylvania Ave Kanasas Cty, MO 64111 | 44-0604809     | 501(c)(3)                                 | 35,466                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Tri-Cities TNVA Inc330 Broad St Suite 1 Kingsport, TN 37660   | 62-0757847     | 501(c)(3)                                 | 7,544                           |                                          |                                                              |                                               | To support the Organization               |
| JA of Central Pennsylvania Inc2420 Gehman Lane Suite Lancaster, PA 17602            | 23-1472517     | 501(c)(3)                                 | 7,597                           |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Southern Nevada Inc7220 S Cimmaron St 130 Las Vegas, NV 89113 | 88-0354481     | 501(c)(3)                                 | 89,080                          |                                          |                                                              |                                               | To support the Organization               |
| JA of Northeastern New York Inc8 Stanley Circle Latham, NY 12110                    | 14-1429763     | 501(c)(3)                                 | 37,598                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Lincoln Inc285 South 68th Place 508 Lincoln, NE 68510         | 47-0535692     | 501(c)(3)                                 | 15,000                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Arkansas Inc1501 N University Ave Little Rock, AR 72207       | 71-0658775     | 501(c)(3)                                 | 30,726                          |                                          |                                                              |                                               | To support the Organization               |
| JA of Southern California Inc 6250 Forest Lawn Dr Los Angeles, CA 90068             | 95-1799192     | 501(c)(3)                                 | 76,339                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Kentuckiana Inc1401 W Muhammed Ali Louisville, KY 40203       | 61-0476694     | 501(c)(3)                                 | 75,280                          |                                          |                                                              |                                               | To support the Organization               |
| JA of The Upper Midwest Inc 1800 White Bear Ave N Maplewood, MN 55109               | 41-1424988     | 501(c)(3)                                 | 35,042                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of the Space Coast Inc2287 W Eau Gallie Blvd Melbourne, FL 32935 | 59-2461562     | 501(c)(3)                                 | 7,500                           |                                          |                                                              |                                               | To support the Organization               |

**Form 990, Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States**

| <b>(a)</b> Name and address of organization or government                              | <b>(b)</b> EIN | <b>(c)</b> IRC Code section if applicable | <b>(d)</b> Amount of cash grant | <b>(e)</b> Amount of non-cash assistance | <b>(f)</b> Method of valuation (book, FMV, appraisal, other) | <b>(g)</b> Description of non-cash assistance | <b>(h)</b> Purpose of grant or assistance |
|----------------------------------------------------------------------------------------|----------------|-------------------------------------------|---------------------------------|------------------------------------------|--------------------------------------------------------------|-----------------------------------------------|-------------------------------------------|
| JA of Memphis and the Mid-South Inc307 Madison Avenue<br>Memphis, TN 38103             | 62-0549549     | 501(c)(3)                                 | 26,972                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Wisconsin Inc1111 West Liberty Drive<br>Milwaukee, WI 53224      | 39-0826295     | 501(c)(3)                                 | 76,598                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of the Heartland Inc800 12th Avenue<br>Moline, IL 61265             | 36-2684253     | 501(c)(3)                                 | 28,100                          |                                          |                                                              |                                               | To support the Organization               |
| JA of Middle Tennessee Inc 120 Powell Place<br>Nashville, TN 37204                     | 62-0582571     | 501(c)(3)                                 | 44,224                          |                                          |                                                              |                                               | To support the Organization               |
| JA of Greater New Orleans Inc5100 Orleans Avenue<br>New Orleans, LA 70124              | 72-0469314     | 501(c)(3)                                 | 8,732                           |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of New York Inc205 E 42nd St Ste 203<br>New York, NY 10017          | 13-3031828     | 501(c)(3)                                 | 167,767                         |                                          |                                                              |                                               | To support the Organization               |
| JA of Greater Hampton Roads Inc6387 Ctr Dr Bldg 2 Ste 3<br>Norfolk, VA 23502           | 54-0799839     | 501(c)(3)                                 | 35,020                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Greater Miami Inc13490 NW 7 Avenue<br>North Miami, FL 33168      | 59-0807486     | 501(c)(3)                                 | 156,318                         |                                          |                                                              |                                               | To support the Organization               |
| JA of Southwest Connecticut Inc200 Connecticut Avenue<br>Norwalk, CT 06854             | 06-0932913     | 501(c)(3)                                 | 64,722                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Central Florida Inc2121 Camden Road<br>Orlando, FL 328031487     | 59-0972112     | 501(c)(3)                                 | 67,126                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of West Kentucky Inc1195 Wing Ave<br>Owensboro, KY 42303            | 61-0564988     | 501(c)(3)                                 | 22,760                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Central Maryland Inc10711 Red Run Blvd<br>Owings Mills, MD 21117 | 52-0688275     | 501(c)(3)                                 | 10,159                          |                                          |                                                              |                                               | To support the Organization               |

**Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States**

| <b>(a)</b> Name and address of organization or government                             | <b>(b)</b> EIN | <b>(c)</b> IRC Code section if applicable | <b>(d)</b> Amount of cash grant | <b>(e)</b> Amount of non-cash assistance | <b>(f)</b> Method of valuation (book, FMV, appraisal, other) | <b>(g)</b> Description of non-cash assistance | <b>(h)</b> Purpose of grant or assistance |
|---------------------------------------------------------------------------------------|----------------|-------------------------------------------|---------------------------------|------------------------------------------|--------------------------------------------------------------|-----------------------------------------------|-------------------------------------------|
| Junior Achievement of Northwest Florida Inc1010 N 12th Ave Ste 233 Pensacola,FL 32501 | 59-0839555     | 501(c)(3)                                 | 9,196                           |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Central Illinois Inc4450 N Prospect Rd Peoria Heights,IL 61616  | 37-0657600     | 501(c)(3)                                 | 9,601                           |                                          |                                                              |                                               | To support the Organization               |
| JA of Western Pennsylvania IncOne Allegheny Sq 430 Pittsburgh,PA 15212                | 25-0983059     | 501(c)(3)                                 | 29,524                          |                                          |                                                              |                                               | To support the Organization               |
| JA of Oregon and SW Washington Inc7830 SE Foster Road Portland,OR 97206               | 93-0384007     | 501(c)(3)                                 | 18,260                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of New Jersey Inc4365 Route 1 South Princeton,NJ 08540             | 22-1774147     | 501(c)(3)                                 | 94,531                          |                                          |                                                              |                                               | To support the Organization               |
| JA of Eastern North Carolina Inc4900 Waters Edge Dr 175 Raleigh,NC 27606              | 56-1107715     | 501(c)(3)                                 | 12,742                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Berks County Inc531 Canal St Suite 403 Reading,PA 19602         | 23-1714363     | 501(c)(3)                                 | 8,000                           |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Dallas Inc1201 Executive Dr W Richardson,TX 75081               | 75-0881589     | 501(c)(3)                                 | 167,376                         |                                          |                                                              |                                               | To support the Organization               |
| JA of Rochester New York Inc259 Monroe Ave Ste 108 Rochester,NY 14607                 | 16-0956147     | 501(c)(3)                                 | 11,356                          |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Sacramento Inc3800 Watt Ave Ste 165 Sacramento,CA 95821         | 94-6080866     | 501(c)(3)                                 | 7,184                           |                                          |                                                              |                                               | To support the Organization               |
| JA of Northeast Michigan Inc 1781 Fordney Street Saginaw,MI 48601                     | 38-1746900     | 501(c)(3)                                 | 5,382                           |                                          |                                                              |                                               | To support the Organization               |
| Junior Achievement of Utah Inc515 E 100 Soluth 200 Slr Lke City,UT 84102              | 87-0225875     | 501(c)(3)                                 | 20,870                          |                                          |                                                              |                                               | To support the Organization               |

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

| (a) Name and address of organization or government                                | (b) EIN    | (c) IRC Code section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|-----------------------------------------------------------------------------------|------------|------------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|------------------------------------|
| Junior Achievement of South Texas Inc403 E Ramsey Ste 201 San Antonio, TX 78216   | 74-2061852 | 501(c)(3)                          | 48,857                   |                                   |                                                       |                                        | To support the Organization        |
| JA of San Diego & Imperial Co Inc4756 Mission Gorge Pl San Diego, CA 92120        | 95-1727087 | 501(c)(3)                          | 24,024                   |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of Washington1700 Westlake Ave N 400 Seattle, WA 98109         | 91-0604913 | 501(c)(3)                          | 20,168                   |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of North Louisiana Inc3825 Gilbert Drive Shreveport, LA 71104  | 72-0595081 | 501(c)(3)                          | 13,248                   |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of South Dakota Inc1000 NW Ave 110 Sioux Falls, SD 571041314   | 46-0306352 | 501(c)(3)                          | 75,156                   |                                   |                                                       |                                        | To support the Organization        |
| JA of The Hudson Valley Inc 12 Hamilton Pl Ste 2 Tarrytown, NY 10591              | 13-3001065 | 501(c)(3)                          | 6,513                    |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of Arizona Inc636 West Southern Ave Tempe, AZ 852824508        | 86-0184349 | 501(c)(3)                          | 45,298                   |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of Kansas Inc501 SE Jefferson St Ste 22 Topeka, KS 66607       | 48-0731855 | 501(c)(3)                          | 18,702                   |                                   |                                                       |                                        | To support the Organization        |
| Junior Achievement of Oklahoma Inc3947 South 103rd E Ave Tulsa, OK 74146          | 73-0757053 | 501(c)(3)                          | 36,808                   |                                   |                                                       |                                        |                                    |
| JA of Northern California Inc 3003 Oak Rd Ste 109 Walnut Creek, CA 94597          | 94-1322179 | 501(c)(3)                          | 166,987                  |                                   |                                                       |                                        |                                    |
| JA of Northern New England Inc400 Fifth Avenue Ste 300 Waltham, MA 02451          | 04-2127020 | 501(c)(3)                          | 39,946                   |                                   |                                                       |                                        |                                    |
| Junior Achievement of Greater Washington1050 17th St Ste 750 Washington, DC 20036 | 54-0788947 | 501(c)(3)                          | 38,200                   |                                   |                                                       |                                        |                                    |

Form 990,Schedule I, Part II, Grants and Other Assistance to Governments and Organizations in the United States

| (a) Name and address of organization or government                                | (b) EIN    | (c) IRC Code section if applicable | (d) Amount of cash grant | (e) Amount of non-cash assistance | (f) Method of valuation (book, FMV, appraisal, other) | (g) Description of non-cash assistance | (h) Purpose of grant or assistance |
|-----------------------------------------------------------------------------------|------------|------------------------------------|--------------------------|-----------------------------------|-------------------------------------------------------|----------------------------------------|------------------------------------|
| Junior Achievement of Delaware Valley Inc993 Old Eagle School 410 Wayne, PA 19087 | 23-1386172 | 501(c)(3)                          | 9,005                    |                                   |                                                       |                                        |                                    |
| Junior Achievement of Guam 414 W Soledad Ave Hagatna, Guam GQ                     | 98-0031547 | 501(c)(3)                          | 10,000                   |                                   |                                                       |                                        | To support the Organization        |

Schedule J  
(Form 990)

Compensation Information

OMB No 1545-0047

2010

Open to Public Inspection

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

▶ Complete if the organization answered "Yes" to Form 990, Part IV, question 23.

▶ Attach to Form 990. ▶ See separate instructions.

|                                                    |                                              |
|----------------------------------------------------|----------------------------------------------|
| Name of the organization<br>Junior Achievement USA | Employer identification number<br>84-1267604 |
|----------------------------------------------------|----------------------------------------------|

Part I

Questions Regarding Compensation

|                                                                                                                                                                                                                                    |        |    |
|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|--------|----|
|                                                                                                                                                                                                                                    | Yes    | No |
| 1a Check the appropriate box(es) if the organization provided any of the following to or for a person listed in Form 990, Part VII, Section A, line 1a Complete Part III to provide any relevant information regarding these items |        |    |
| <input type="checkbox"/> First-class or charter travel                                                                                                                                                                             |        |    |
| <input type="checkbox"/> Travel for companions                                                                                                                                                                                     |        |    |
| <input type="checkbox"/> Tax idemnification and gross-up payments                                                                                                                                                                  |        |    |
| <input type="checkbox"/> Discretionary spending account                                                                                                                                                                            |        |    |
| <input type="checkbox"/> Housing allowance or residence for personal use                                                                                                                                                           |        |    |
| <input type="checkbox"/> Payments for business use of personal residence                                                                                                                                                           |        |    |
| <input checked="" type="checkbox"/> Health or social club dues or initiation fees                                                                                                                                                  |        |    |
| <input type="checkbox"/> Personal services (e g , maid, chauffeur, chef)                                                                                                                                                           |        |    |
| b If any of the boxes in line 1a are checked, did the organization follow a written policy regarding payment or reimbursement or provision of all the expenses described above? If "No," complete Part III to explain              | 1b Yes |    |
| 2 Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all officers, directors, trustees, and the CEO/Executive Director, regarding the items checked in line 1a?                     | 2 Yes  |    |
| 3 Indicate which, if any, of the following the organization uses to establish the compensation of the organization's CEO/Executive Director Check all that apply                                                                   |        |    |
| <input checked="" type="checkbox"/> Compensation committee                                                                                                                                                                         |        |    |
| <input checked="" type="checkbox"/> Independent compensation consultant                                                                                                                                                            |        |    |
| <input checked="" type="checkbox"/> Form 990 of other organizations                                                                                                                                                                |        |    |
| <input type="checkbox"/> Written employment contract                                                                                                                                                                               |        |    |
| <input checked="" type="checkbox"/> Compensation survey or study                                                                                                                                                                   |        |    |
| <input checked="" type="checkbox"/> Approval by the board or compensation committee                                                                                                                                                |        |    |
| 4 During the year, did any person listed in Form 990, Part VII, Section A, line 1a with respect to the filing organization or a related organization                                                                               |        |    |
| a Receive a severance payment or change-of-control payment from the organization or a related organization?                                                                                                                        | 4a Yes |    |
| b Participate in, or receive payment from, a supplemental nonqualified retirement plan?                                                                                                                                            | 4b     | No |
| c Participate in, or receive payment from, an equity-based compensation arrangement?                                                                                                                                               | 4c     | No |
| If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III                                                                                                                       |        |    |
| Only 501(c)(3) and 501(c)(4) organizations only must complete lines 5-9.                                                                                                                                                           |        |    |
| 5 For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the revenues of                                                                                  |        |    |
| a The organization?                                                                                                                                                                                                                | 5a     | No |
| b Any related organization?                                                                                                                                                                                                        | 5b     | No |
| If "Yes," to line 5a or 5b, describe in Part III                                                                                                                                                                                   |        |    |
| 6 For persons listed in form 990, Part VII, Section A, line 1a, did the organization pay or accrue any compensation contingent on the net earnings of                                                                              |        |    |
| a The organization?                                                                                                                                                                                                                | 6a     | No |
| b Any related organization?                                                                                                                                                                                                        | 6b     | No |
| If "Yes," to line 6a or 6b, describe in Part III                                                                                                                                                                                   |        |    |
| 7 For persons listed in Form 990, Part VII, Section A, line 1a, did the organization provide any non-fixed payments not described in lines 5 and 6? If "Yes," describe in Part III                                                 | 7 Yes  |    |
| 8 Were any amounts reported in Form 990, Part VII, paid or accrued pursuant to a contract that was subject to the initial contract exception described in Regs section 53 4958-4(a)(3)? If "Yes," describe in Part III             | 8      | No |
| 9 If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?                                                                                         | 9      |    |

**Part II** **Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees.** Use duplicate copies if additional space is needed.

For each individual whose compensation must be reported in Schedule J, report compensation from the organization on row (i) and from related organizations, described in the instructions on row (ii) Do not list any individuals that are not listed on Form 990, Part VII

**Note.** The sum of columns (B)(i)-(iii) must equal the applicable column (D) or column (E) amounts on Form 990, Part VII, line 1a

| (A) Name             |      | (B) Breakdown of W-2 and/or 1099-MISC compensation |                                     |                                     | (C) Retirement and other deferred compensation | (D) Nontaxable benefits | (E) Total of columns (B)(i)-(D) | (F) Compensation reported in prior Form 990 or Form 990-EZ |
|----------------------|------|----------------------------------------------------|-------------------------------------|-------------------------------------|------------------------------------------------|-------------------------|---------------------------------|------------------------------------------------------------|
|                      |      | (i) Base compensation                              | (ii) Bonus & incentive compensation | (iii) Other reportable compensation |                                                |                         |                                 |                                                            |
| (1) Sean Rush        | (i)  | 467,100                                            | 134,271                             | 2,838                               | 83,689                                         | 1,008                   | 688,906                         | 41,631                                                     |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| (2) Timothy Armijo   | (i)  | 130,681                                            | 15,841                              | 795                                 | 31,879                                         | 18,041                  | 197,237                         | 7,532                                                      |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| (3) Jack Kosakowski  | (i)  | 293,237                                            | 74,767                              | 9,018                               | 75,804                                         | 20,388                  | 473,214                         | 23,181                                                     |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| (4) Cecil Thibodeaux | (i)  | 205,069                                            | 35,394                              | 2,406                               | 47,657                                         | 15,206                  | 305,732                         | 10,974                                                     |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| (5) Thomas Dewar     | (i)  | 152,000                                            | 0                                   | 81,537                              | 97,300                                         | 20,030                  | 350,867                         | 0                                                          |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| (6) John Box         | (i)  | 155,761                                            | 18,335                              | 2,701                               | 32,232                                         | 14,561                  | 223,590                         | 8,717                                                      |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| (7) Don Crevling     | (i)  | 225,713                                            | 33,669                              | 4,095                               | 43,427                                         | 14,826                  | 321,730                         | 12,637                                                     |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| (8) Peter Curcio     | (i)  | 111,572                                            | 0                                   | 55,939                              | 72,368                                         | 18,718                  | 258,597                         | 0                                                          |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| (9) Linda Rimer      | (i)  | 199,341                                            | 23,777                              | 3,619                               | 37,524                                         | 10,665                  | 274,926                         | 11,305                                                     |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| (10) Howard Bartner  | (i)  | 130,868                                            | 20,479                              | 814                                 | 49,705                                         | 23,091                  | 224,957                         | 7,687                                                      |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| (11) Steve Schmidt   | (i)  | 133,746                                            | 16,167                              | 531                                 | 24,918                                         | 20,454                  | 195,816                         | 7,687                                                      |
|                      | (ii) | 0                                                  | 0                                   | 0                                   | 0                                              | 0                       | 0                               | 0                                                          |
| ( 12 )               |      |                                                    |                                     |                                     |                                                |                         |                                 |                                                            |
| ( 13 )               |      |                                                    |                                     |                                     |                                                |                         |                                 |                                                            |
| ( 14 )               |      |                                                    |                                     |                                     |                                                |                         |                                 |                                                            |
| ( 15 )               |      |                                                    |                                     |                                     |                                                |                         |                                 |                                                            |
| ( 16 )               |      |                                                    |                                     |                                     |                                                |                         |                                 |                                                            |

Part IIISupplemental Information

Complete this part to provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 4c, 5a, 5b, 6a, 6b, 7, and 8. Also complete this part for any additional information.

| Identifier                      | Return Reference                  | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                         |
|---------------------------------|-----------------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Schedule J, Part I, Question 1a | Health or Social Club Dues        | Monthly club membership fees for the COO and President of JA USA is part of the benefits provided to this position. These fees are included as taxable income each year on their W-2.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                               |
| Schedule J, Part I, Question 7  | Description of Non-Fixed Payments | There are two key components of the Executive Compensation Philosophy of JA Worldwide: 1. Reward for performance; 2. Provide reasonable and competitive pay packages with those offered to leaders of organizations comparable to JA Worldwide in terms of global size, global complexity, and mission impact. As part of the "reward for performance," the Executive Compensation Subcommittee (the Committee) of the Board of Governors has adopted the Management Incentive Compensation Plan (MIC). MIC is intended to stimulate and reward results and achievement necessary to accomplish the multiple objectives of JA Worldwide's strategic plan. The MIC Plan is designed to: a) Motivate growth in total revenue and program impact to enhance services to the community; b) Link accomplishment of the organization's mission and objectives with the compensation of the organization's managers; c) Control costs by providing variable compensation based on performance to enhance affordability and offering a competitive incentive and total cash compensation program; d) Enhance the focus, motivation, and retention of key organizational managers. In setting the annual incentive compensation opportunities for the MIC for each executive, the Committee targets the median of the comparable market data for that executive's position for target performance and the upper quartile of the comparable market data for that executive's position for superior performance. There is a cap on the amount of incentive that any executive can earn from the MIC. The Committee uses discretion in determining the level or achievement of certain performance measurements. The Committee also annually examines the comparable market data for these positions, following the three-step governance process described in the regulations to Section 4958 on Intermediate Sanctions to establish the presumption of reasonable compensation. The Governors may, in their sole discretion, and at any time, elect to amend, suspend, or terminate the Plan. |
| Schedule J, Part I, Question 4a | Severance Payments                | Thomas Dewar and Peter Curcio both received severance in 2010. Severance payments made in 2010 have been included on Schedule J, Part II, column B (iii) for each individual. Deferred severance amounts have been included on Schedule J, Part II, column C for each individual.                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                   |

SCHEDULE O

(Form 990 or 990-EZ)

Department of the Treasury  
Internal Revenue Service

Supplemental Information to Form 990 or 990-EZ

Complete to provide information for responses to specific questions on  
Form 990 or to provide any additional information.  
▶ Attach to Form 990 or 990-EZ.

OMB No 1545-0047

2010

Open to Public  
Inspection

|                                                           |                                                     |
|-----------------------------------------------------------|-----------------------------------------------------|
| <b>Name of the organization</b><br>Junior Achievement USA | <b>Employer identification number</b><br>84-1267604 |
|-----------------------------------------------------------|-----------------------------------------------------|

| Identifier                     | Return Reference      | Explanation                                                                                                                                                                                                     |
|--------------------------------|-----------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Describe process to review 990 | Part VI, Question 11B | The Form 990 is prepared by a third party and is review ed by the Audit committee of the Board A draft is supplied via a web site link for the entire Board to review before filing the final 990 w ith the IRS |

| Identifier                                                       | Return Reference      | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                  |
|------------------------------------------------------------------|-----------------------|------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Describe how conflict of interest policy is monitored & enforced | Part VI, Question 12c | A conflict of interest questionnaire is sent via email or hand delivered to interested parties each year requesting verification of possible conflicts. If a conflict is disclosed in connection with any actual or possible conflict of interest an interested person must disclose the existence of the interest and be given the opportunity to disclose all material facts to the directors and members of the committees with governing board delegated powers considering the proposed transaction or arrangement. After disclosure of the interest and all material facts, and after any discussion with the interested person, he or she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists. |

| Identifier                                    | Return Reference              | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                          |
|-----------------------------------------------|-------------------------------|--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Describe process for determining compensation | Part VI, Question 15a and 15b | The governance process for determining compensation for the Organization's CEO and other top management is modeled after the requirements in Internal Revenue Code Section 4958 to establish the presumption of reasonable compensation. Compensation was reviewed and approved by the Executive Compensation Subcommittee (the Committee) of the Board of Governors, which is comprised of independent persons. By engaging an independent compensation consultant, the Committee considered comparable market data from published surveys and Form 990 of comparable organizations in evaluating the compensation for each individual. The Committee conducted a review of this comparability data and documented its deliberation and discussion in minutes that are retained with the other governance materials of the Organization. The Committee followed the process to establish the presumption that compensation paid to the Organization's CEO and other top management for purposes of Section 4958 by relying on professional advice in the written opinion of reasonableness from the independent compensation consultant. This review process is conducted annually. |

| Identifier                                              | Return<br>Reference  | Explanation                                                                                                                             |
|---------------------------------------------------------|----------------------|-----------------------------------------------------------------------------------------------------------------------------------------|
| Describe how documents are made available to the public | Part VI, Question 19 | JA Worldw ide makes its financial statements, governing documents, and conflict of interest policy available to the public upon request |

| Identifier         | Return Reference                             | Explanation                                                                                                                                                                                                                                                                                               |
|--------------------|----------------------------------------------|-----------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Member Information | 990 Part VI, Section A, Questions 6, 7a & 7b | Line 6 The organization has members which are the individual operating offices throughout the world<br>Each member has voting rights Line 7a Members have voting rights to approve the directors and officers of the organization Line 7b Members have voting rights for approval of proposed fee changes |

| Identifier                  | Return Reference | Explanation              |
|-----------------------------|------------------|--------------------------|
| Other Changes to Net Assets | Part XI, Line 5  | Unrealized Gains 730,794 |

| Identifier | Return Reference       | Explanation                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                                           |
|------------|------------------------|-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------|
| Part III   | Organization's Mission | Junior Achievement is the world's largest organization dedicated to giving young people the knowledge and skills they need to own their economic success, plan for their future, and make smart academic and economic choices. Our financial literacy, work readiness and entrepreneurship programs empower students to make a connection between what they learn in school and how it can be applied in the real world. This enhances the relevance of their classroom learning and increases their understanding of the value of staying in school. |