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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 organization's program service accomplishments for each of its three largest program services, as measured 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 \$ 19,603,275 including grants of \$ 6,652,849) (Revenue \$ 13,366,104)

THE ORGANIZATION ASSISTED ITS US AREAS IN SETTING UP AND/OR MAINTAINING THEIR OWN ORGANIZATION TO ADMINISTER JUNIOR ACHIEVEMENT PROGRAMS JA'S MEMBERS REACHED APPROXIMATELY 4.2 MILLION ELEMENTARY THROUGH POST SECONDARY STUDENTS FOR THE YEAR ENDED 6/30/2012

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 \$ 19,603,275

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.	Yes	
2	Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	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.		No
4	Section 501(c)(3) organizations. 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.	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.		No
6	Did the organization maintain any donor advised funds or any similar funds or accounts for which 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.		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.		No
8	Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III.		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.	Yes	
10	Did the organization, directly or through a related organization, hold assets in temporarily restricted endowments, permanent endowments, or quasi-endowments? If "Yes," complete Schedule D, Part V.	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.	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.		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.		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.		No
e	Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X.	Yes	
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.		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.	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.		No
13	Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E.		No
14a	Did the organization maintain an office, employees, or agents outside of the United States?		No
b	Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Part I.	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, Part II and IV.	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, Part III and IV.		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.		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.		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.		No
20a	Did the organization operate one or more hospitals? If "Yes," complete Schedule H.		No
b	If "Yes" to line 20a, did the organization attach its audited financial statement to this return? Note. All Form 990 filers that operated one or more hospitals must attach audited financial statements.		

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 questions 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	Section 501(c)(3) and 501(c)(4) organizations. 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 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
35a	Is any related organization a controlled entity of the filing organization within the meaning of section 512(b)(13)?	35a		No
b	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>	35b		No
36	Section 501(c)(3) organizations. 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? Note. 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 ☐								
					Yes	No		
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable. .				1a	43		
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, Transmittal of Wage and Tax Statements filed for the calendar year ending with or within the year covered by this return. .				2a	96		
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? Note. If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).				2b	Yes		
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 or securities account)?				4a			No
b	If "Yes," enter the name of the foreign country: _____ 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?				12a			
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? Note. All 501(c)(29) organizations must list in Schedule O each state in which they are licensed to issue qualified health plans, the amount of reserves required by each state, and the amount of reserves the organization allocated to each state.				13a			
b	Enter the aggregate 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 aggregate amount of reserves on hand.				13c			
14a	Did the organization receive any payments for indoor tanning services during the tax year?				14a			No
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O.				14b			

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		
1a	26		
b	Enter the number of voting members included in line 1a, above, who are independent	1b	24
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	Yes
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5	No
6	Did the organization have members or stockholders?	6	Yes
7a	Did the organization have members, stockholders, or other persons who had the power to elect or appoint one or more members of the governing body?	7a	No
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?	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	Did the organization have local chapters, branches, or affiliates?	10a	Yes
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	Yes
11a	Has the organization provided a complete 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 the Form 990		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13	12a	Yes
b	Were officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this was done	12c	Yes
13	Did the organization have a written whistleblower policy?	13	Yes
14	Did 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," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take 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 made these available. Check all that apply. ☒ Own website ☐ Another's website ☒ Upon request
19	Describe in Schedule O whether (and if so, how), the organization made 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. ☒ TIMOTHY ARMIJO ONE EDUCATION WAY Colorado Springs, CO 80906 (719) 540-6235

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

1a Complete this table for all persons required to be listed. Report compensation for the calendar year ending with or within the organization's tax year.

- List persons in the following order: individual trustees or directors; institutional trustees; officers; key employees; highest compensated employees; and former such persons

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

[illegible]

Part VIII

Statement of Revenue

				(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512, 513, or 514
Contributions, gifts, grants 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	567,973			
	f	All other contributions, gifts, grants, and similar amounts not included above	1f	11,548,972			
	g	Noncash contributions included in lines 1a-1f \$ 18,866					
	h	Total. Add lines 1a-1f		12,116,945			
Program Service Revenue			Business Code				
	2a	AREA LICENSE FEES	611710	4,314,280	4,314,280		
	b	SUPPORT FEES	611710	745,000	745,000		
	c						
	d						
	e						
	f	All other program service revenue					
	g	Total. Add lines 2a-2f		5,059,280			
Other Revenue	3	Investment income (including dividends, interest and other similar amounts)		256,609			256,609
	4	Income from investment of tax-exempt bond proceeds . .		0			
	5	Royalties		0			
	6a	(i) Real					
		6,765					
		(ii) Personal					
	b	Less rental expenses					
	c	Rental income or (loss)		6,765			
	d	Net rental income or (loss)		6,765			6,765
	7a	(i) Securities					
		1,651,186					
		(ii) Other					
	b	Less cost or other basis and sales expenses					
	c	Gain or (loss)		120,073			
	d	Net gain or (loss)		120,073			120,073
	8a	Gross income from fundraising events (not including \$ of contributions reported on line 1c) See Part IV, line 18					
	b	Less direct expenses					
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						
c	Net income or (loss) from gaming activities . .		0				
10a	Gross sales of inventory, less returns and allowances						
							a
							13,547,065
b	Less cost of goods sold		5,333,273				
c	Net income or (loss) from sales of inventory . .		8,213,792	8,213,792			
Miscellaneous Revenue		Business Code					
11a	MISCELLANEOUS		900099	93,032	93,032		
b							
c							
d	All other revenue						
e	Total. Add lines 11a-11d		93,032				
12	Total revenue. See Instructions		25,866,496	13,366,104			383,447

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)
Check if Schedule O contains a response to any question in this Part IX

Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.		(A) Total expenses	(B) Program service expenses	(C) Management and general expenses	(D) Fundraising expenses
1	Grants and other assistance to governments and organizations in the United States See Part IV, line 21	3,734,147	3,734,147		
2	Grants and other assistance to individuals in the United States See Part IV, line 22	0			
3	Grants and other assistance to governments, organizations, and individuals outside the United States See Part IV, lines 15 and 16	2,918,702	2,918,702		
4	Benefits paid to or for members	0			
5	Compensation of current officers, directors, trustees, and key employees	2,854,457	2,117,094	618,732	118,631
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	4,813,631	3,369,542	1,155,271	288,818
8	Pension plan contributions (include section 401(k) and section 403(b) employer contributions)	299,526	209,668	76,379	13,479
9	Other employee benefits	557,157	390,010	142,075	25,072
10	Payroll taxes	537,992	376,594	137,188	24,210
11	Fees for services (non-employees)				
a	Management	1,489,205		1,325,392	163,813
b	Legal	188,585	47,146	141,439	
c	Accounting	113,375	28,344	85,031	
d	Lobbying	178,529	142,823	35,706	0
e	Professional fundraising See Part IV, line 17	0			
f	Investment management fees	70,033	21,010	42,020	7,003
g	Other	15,568	11,165	2,709	1,694
12	Advertising and promotion	416,074	295,413	104,018	16,643
13	Office expenses	512,803	389,730	97,433	25,640
14	Information technology	810,324	510,504	267,407	32,413
15	Royalties	0			
16	Occupancy	441,914	287,244	119,317	35,353
17	Travel	957,924	699,284	191,585	67,055
18	Payments of travel or entertainment expenses for any federal, state, or local public officials	0			
19	Conferences, conventions, and meetings	178,337	146,236	23,184	8,917
20	Interest	10,005		10,005	
21	Payments to affiliates	1,091,000	809,173	236,485	45,342
22	Depreciation, depletion, and amortization	925,800	685,462	181,087	59,251
23	Insurance	36,714	27,230	7,958	1,526
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	RESEARCH & DEVELOPMENT	1,657,563	1,657,563	0	0
b	MISCELLANEOUS	983,161	729,191	213,110	40,860
c					
d					
e					
f	All other expenses				
25	Total functional expenses. Add lines 1 through 24f	25,792,526	19,603,275	5,213,531	975,720
26	Joint costs. Check here ☐ 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				5,771,490	1	1,340,014
	2	Savings and temporary cash investments				2,007,029	2	255,411
	3	Pledges and grants receivable, net				2,610,964	3	2,600,312
	4	Accounts receivable, net				1,170,993	4	1,172,790
	5	Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L				0	5	0
	6	Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L				0	6	0
	7	Notes and loans receivable, net				0	7	0
	8	Inventories for sale or use				2,426,121	8	2,482,219
	9	Prepaid expenses and deferred charges				211,693	9	550,556
	10a	Land, buildings, and equipment—cost or other basis. Complete Part VI of Schedule D	10a	13,687,832				
	b	Less—accumulated depreciation	10b	11,086,849	3,293,315	10c	2,600,983	
	11	Investments—publicly traded securities				8,241,964	11	7,659,240
	12	Investments—other securities. See Part IV, line 11				0	12	0
	13	Investments—program-related. See Part IV, line 11				0	13	0
	14	Intangible assets				0	14	0
	15	Other assets. See Part IV, line 11				0	15	0
	16	Total assets. Add lines 1 through 15 (must equal line 34)				25,733,569	16	18,661,525
Liabilities	17	Accounts payable and accrued expenses				4,238,999	17	3,524,928
	18	Grants payable				0	18	0
	19	Deferred revenue				113,125	19	99,247
	20	Tax-exempt bond liabilities				0	20	0
	21	Escrow or custodial account liability. Complete Part IV of Schedule D				5,130,215	21	1,731,730
	22	Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L				0	22	0
	23	Secured mortgages and notes payable to unrelated third parties				424,888	23	294,081
	24	Unsecured notes and loans payable to unrelated third parties				0	24	0
	25	Other liabilities (including federal income tax, payables to related third parties, and other liabilities not included on lines 17-24). Complete Part X of Schedule D				0	25	66,859
	26	Total liabilities. Add lines 17 through 25				9,907,227	26	5,716,845
Net Assets or Fund Balances	Organizations that follow SFAS 117, check here ☒ and complete lines 27 through 29, and lines 33 and 34.							
	27	Unrestricted net assets				7,711,908	27	7,946,437
	28	Temporarily restricted net assets				8,114,434	28	4,998,243
	29	Permanently restricted net assets				0	29	0
	Organizations that do not follow SFAS 117, check here ☐ 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				15,826,342	33	12,944,680
	34	Total liabilities and net assets/fund balances				25,733,569	34	18,661,525

Part XI Reconciliation of Net Assets

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

1	Total revenue (must equal Part VIII, column (A), line 12)	1	25,866,496
2	Total expenses (must equal Part IX, column (A), line 25)	2	25,792,526
3	Revenue less expenses Subtract line 2 from line 1	3	73,970
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	15,826,342
5	Other changes in net assets or fund balances (explain in Schedule O)	5	-2,955,632
6	Net assets or fund balances at end of year Combine lines 3, 4, and 5 (must equal Part X, line 33, column (B))	6	12,944,680

Part XII Financial Statements and Reporting

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

		Yes	No
1	Accounting method used to prepare the Form 990 ☐ Cash ☒ Accrual ☐ Other If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O		
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?		No
b	Were the organization's financial statements audited by an independent accountant?	Yes	
c	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? If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O	Yes	
d	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 ☒ Separate basis ☐ Consolidated basis ☐ Both consolidated and separated basis		
3a	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?		No
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		

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

2011

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

Part II

Support Schedule for Organizations Described in IRC 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) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")	21,972,721	22,321,320	22,132,445	21,021,882	12,116,945	99,565,313
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	21,972,721	22,321,320	22,132,445	21,021,882	12,116,945	99,565,313
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)						30,427,536
6 Public Support. Subtract line 5 from line 4						69,137,777

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(f) Total
7 Amounts from line 4	21,972,721	22,321,320	22,132,445	21,021,882	12,116,945	99,565,313
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	237,802	238,139	222,245	196,152	263,374	1,157,712
9 Net income from unrelated business activities, whether or not the business is regularly carried on						
10 Other income (Explain in Part IV) Do not include gain or loss from the sale of capital assets						
11 Total support (Add lines 7 through 10)						100,723,025

12 Gross receipts from related activities, etc (See instructions)

1290,456,808

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 2011 (line 6 column (f) divided by line 11 column (f))	14	68 642 %
15 Public Support Percentage for 2010 Schedule A, Part II, line 14	15	69 698 %

16a 33 1/3% support test—2011. 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—2010. 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—2011. 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—2010. 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 IRC 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) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(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) 2007	(b) 2008	(c) 2009	(d) 2010	(e) 2011	(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 501(c)(3) organization, check this box and stop here						

Section C. Computation of Public Support Percentage		
15 Public Support Percentage for 2011 (line 8 column (f) divided by line 13 column (f))	15	
16 Public support percentage from 2010 Schedule A, Part III, line 15	16	

Section D. Computation of Investment Income Percentage		
17 Investment income percentage for 2011 (line 10c column (f) divided by line 13 column (f))	17	
18 Investment income percentage from 2010 Schedule A, Part III, line 17	18	
19a 33 1/3% support tests—2011. 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 stop here . The organization qualifies as a publicly supported organization		
b 33 1/3% support tests—2010. 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 stop here . 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 explanation required by Part II, line 10; Part II, line 17a or 17b; or Part III, line 12. Also complete this part for any additional information. (See instructions).

Facts And Circumstances Test

Explanation

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

2011

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, line 35c (Proxy Tax), then

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

Name of the organization Junior Achievement USA	Employer identification number 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 on behalf of or in opposition to candidates for public office 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 funtion 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 (and list in Part IV each affiliated group member's name, address, EIN, expenses, and share of excess lobbying expenditures)
- B
- Check
- ☐
- if the filing organization checked box A and "limited control" provisions apply

Limits on Lobbying Expenditures (The term "expenditures" means amounts paid or incurred.)		(a) Filing Organization's Totals	(b) Affiliated Group Totals												
1a	Total lobbying expenditures to influence public opinion (grass roots lobbying)	0													
b	Total lobbying expenditures to influence a legislative body (direct lobbying)	178,529													
c	Total lobbying expenditures (add lines 1a and 1b)	178,529													
d	Other exempt purpose expenditures	25,613,997													
e	Total exempt purpose expenditures (add lines 1c and 1d)	25,792,526													
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?		☐ Yes ☒ 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) 2008	(b) 2009	(c) 2010	(d) 2011	(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 (150% of line 2a, column(e))					6,000,000
c Total lobbying expenditures	169,890	173,324	164,990	178,529	686,733
d Grassroots non-taxable amount	0	0	0	250,000	250,000
e Grassroots ceiling amount (150% of line 2d, column (e))					375,000
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	
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
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SCHEDULE D
(Form 990)

Supplemental Financial Statements

OMB No 1545-0047

2011

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

Complete if the organization answered "Yes," to Form 990, Part IV, line 6, 7, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b
Attach to Form 990. See separate instructions.

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?	
	☐ Yes ☐ No	
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	
	☐ Yes ☐ No	

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 ▶ \$ _____

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

	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	8,114,434	8,586,663	11,475,001	12,708,495	
b Contributions	3,726,638	7,408,119	6,823,776	7,806,932	
c Investment earnings or losses	9,873	80,602	70,295	-13,701	
d Grants or scholarships					
e Other expenditures for facilities and programs	6,852,702	7,960,950	9,782,409	9,026,725	
f Administrative expenses					
g End of year balance	4,998,243	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

3a(i)

☐ Yes

☐ No

(ii) related organizations

3a(ii)

☐ Yes

☐ No

b

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

3b

☐ Yes

☐ No

4

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

Part VI

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

Description of property	(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	3,304,696	815,775
c Leasehold improvements		0	0	0
d Equipment		1,349,581	973,853	375,728
e Other		6,957,050	6,808,300	148,750
Total. Add lines 1a-1e (Column (d) should equal Form 990, Part X, column (B), line 10(c).) ▶				2,600,983

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	25,866,496
2	Total expenses (Form 990, Part IX, column (A), line 25)	2	25,792,526
3	Excess or (deficit) for the year Subtract line 2 from line 1	3	73,970
4	Net unrealized gains (losses) on investments	4	-295,391
5	Donated services and use of facilities	5	
6	Investment expenses	6	
7	Prior period adjustments	7	
8	Other (Describe in Part XIV)	8	-2,660,241
9	Total adjustments (net) Add lines 4 - 8	9	-2,955,632
10	Excess or (deficit) for the year per financial statements Combine lines 3 and 9	10	-2,881,662

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	24,305,853
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains on investments	2a	-295,391
b	Donated services and use of facilities	2b	54,324
c	Recoveries of prior year grants	2c	
d	Other (Describe in Part XIV)	2d	5,333,273
e	Add lines 2a through 2d	2e	5,092,206
3	Subtract line 2e from line 1	3	19,213,647
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	6,652,849
c	Add lines 4a and 4b	4c	6,652,849
5	Total Revenue Add lines 3 and 4c. (This should equal Form 990, Part I, line 12)	5	25,866,496

Part XIII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

1	Total expenses and losses per audited financial statements	1	27,187,515
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities	2a	54,324
b	Prior year adjustments	2b	
c	Other losses	2c	
d	Other (Describe in Part XIV)	2d	7,993,514
e	Add lines 2a through 2d	2e	8,047,838
3	Subtract line 2e from line 1	3	19,139,677
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	6,652,849
c	Add lines 4a and 4b	4c	6,652,849
5	Total expenses Add lines 3 and 4c. (This should equal Form 990, Part I, line 18)	5	25,792,526

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 IV, Line 2b	Trust, Escrow, and Custodial Arrangements	The Organization assists its areas in setting up their own organizations to administer Junior Achievement programs. The Organization holds funds on behalf of certain members for their U.S. expenses. These are included in cash and cash equivalents and investments on the statements of financial position and total \$1,062,230 as of June 30, 2012.
Part V, Line 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 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.
Part XI, Line 8	Other changes in Net Assets	NET ASSET TRANSFER TO AFFILIATED ORGANIZATION (2,660,241)
Part XII, Line 2d	Other Revenue on Books, Not on Return	Cost of Goods Sold Reclassed From Expense and Netted Against Revenue 5,333,273
Part XII, Line 4b	Other Revenue on Return, Not on Books	Designated Contributions to US JA Offices and Member Nations Treated as Agency Transactions for Financial Statement Purposes 6,652,849
Part XIII, Line 2d	Other Expenses on Books, Not on Return	Cost of Goods Sold Reclassed From Expense and Netted Against Revenue 5,333,273. NET ASSET TRANSFER TO AFFILIATED ORGANIZATION 2,660,241. TOTAL 7,993,514
Part XIII, Line 4b	Other Expenses on Return, Not on Books	Designated Contributions to US JA Offices and Member Nations Treated as Agency Transactions for Financial Statement Purposes 6,652,849

SCHEDULE F
(Form 990)

Statement of Activities Outside the United States

OMB No 1545-0047

2011

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 grantmakers. 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		122,866
East Asia and the Pacific			Grantmaking		417,605
Europe (Including Iceland and Greenland)			Grantmaking		913,518
Middle East and North Africa	1	3	Grantmaking		846,736
North America			Grantmaking		17,433
Russia and the Newly Independent States			Grantmaking		51,776
South America			Grantmaking		211,007
South Asia			Grantmaking		45,000
Sub-Saharan Africa			Grantmaking		292,761
Sub-Saharan Africa			Fundraising		0
Europe (Including Iceland and Greenland)			Fundraising		0
Middle East and North Africa			Program Services	ECONOMIC EDUCATION PRG	477,682
3a Sub-total	1	3			3,396,384
b Total from continuation sheets to Part I					
c Totals (add lines 3a and 3b)	1	3			3,396,384

[illegible]**Schedule F (Form 990) 2011**

Part III

[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 or member nations 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.

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		7,022	Wire Trnsfr			
		Cent America/Caribbean		38,000	Wire Trnsfr			
		Cent America/Caribbean		21,065	Wire Trnsfr			

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		13,737	Wire Trnsfr			
		Cent America/Caribbean		24,043	Wire Trnsfr			
		Cent America/Caribbean		19,000	Wire Trnsfr			

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)
		East Asia/Pacific		133,010	Wire Trnsfr			
		East Asia/Pacific		21,652	Wire Trnsfr			
		East Asia/Pacific		23,606	Wire Trnsfr			

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)
		East Asia/Pacific		33,200	Wire Trnsfr			
		East Asia/Pacific		129,200	Wire Trnsfr			
		East Asia/Pacific		13,200	Wire Trnsfr			

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)
		East Asia/Pacific		20,000	Wire Trnsfr			
		East Asia/Pacific		26,838	Wire Trnsfr			
		East Asia/Pacific		13,700	Wire Trnsfr			

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)
		Europe/Iceland/Greenland		50,000	Wire Trnsfr			
		Europe/Iceland/Greenland		40,000	Wire Trnsfr			
		Europe/Iceland/Greenland		11,500	Wire Trnsfr			

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)
		Europe/Iceland/Greenland		85,000	Wire Trnsfr			
		Europe/Iceland/Greenland		94,954	Wire Trnsfr			
		Europe/Iceland/Greenland		91,500	Wire Trnsfr			

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)
		Europe/Iceland/Greenland		54,600	Wire Trnsfr			
		Europe/Iceland/Greenland		20,000	Wire Trnsfr			
		Europe/Iceland/Greenland		25,000	Wire Trnsfr			

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)
		Europe/Iceland/Greenland		40,000	Wire Trnsfr			
		Europe/Iceland/Greenland		80,000	Wire Trnsfr			
		Europe/Iceland/Greenland		30,000	Wire Trnsfr			

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)
		Europe/Iceland/Greenland		100,000	Wire Trnsfr			
		Europe/Iceland/Greenland		185,963	Wire Trnsfr			
		Middle East/North Africa		20,000	Wire Trnsfr			

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)
		Middle East/North Africa		55,000	Wire Trnsfr			
		Middle East/North Africa		10,736	Wire Trnsfr			
		Middle East/North Africa		6,000	Wire Trnsfr			

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)
		Middle East/North Africa		475,000	Wire Trnsfr			
		Middle East/North Africa		150,000	Wire Trnsfr			
		Middle East/North Africa		50,000	Wire Trnsfr			

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)
		Middle East/North Africa		80,000	Wire Trnsfr			
		North America		17,433	Wire Trnsfr			
		Russia		10,460	Wire Trnsfr			

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)
		Russia		20,397	Wire Trnsfr			
		Russia		20,920	Wire Trnsfr			
		South America		14,215	Wire Trnsfr			

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)
		South America		28,429	Wire Trnsfr			
		South America		53,000	Wire Trnsfr			
		South America		40,000	Wire Trnsfr			

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)
		South America		37,500	Wire Trnsfr			
		South America		37,863	Wire Trnsfr			
		South Asia		45,000	Wire Trnsfr			

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)
		Sub-Saharan Africa		10,000	Wire Trnsfr			
		Sub-Saharan Africa	To support mission	202,500	Wire Trnsfr			
		Sub-Saharan Africa		17,433	Wire Trnsfr			

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)
		Sub-Saharan Africa		30,000	Wire Trnsfr			
		Sub-Saharan Africa		10,000	Wire Trnsfr			
		Sub-Saharan Africa		10,000	Wire Trnsfr			

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)
		Sub-Saharan Africa		8,500	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

2011

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. Use Part IV and Schedule I-1 (Form 990) if additional space is needed ▶ ☐

(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 listed in the line 1 table ▶

100

3

Enter total number of other organizations listed in the line 1 table ▶

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 Inc1563 Firestone Parkway Akron, OH 44301	34-0940986	501(c)(3)	9,837				To support the Organization
Junior Achievement of Alaska Inc639 W Intl Airport Rd Anchorage, AK 99518	92-0045091	501(c)(3)	6,308				To support the Organization

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

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Junior Achievement of New Mexico Inc 4700 Lincoln Rd NE Albuquerque, NM 87109	85-0416889	501(c)(3)	7,220				To support the Organization
Junior Achievement of Georgia Inc 460 Abernathy Road NE Atlanta, GA 30328	58-0598050	501(c)(3)	153,889				To support the Organization

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

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Junior Achievement of Central Texas Inc PO Box 684571 Austin, TX 78768	74-1688335	501(c)(3)	9,050				To support the Organization
JA of Greater Baton Rouge & Acadiana 7809 Jefferson Hwy Baton Rouge, LA 70809	72-0485727	501(c)(3)	78,951				To support the Organization

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

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JA of Greater Birmingham Inc216 Aquarius Drive Birmingham, AL 35209	63-0340866	501(c)(3)	43,275				To support the Organization
JA of South Central Kentucky Inc440-1/2 E Main Ave Bowling Green, KY 42101	61-0997385	501(c)(3)	8,100				To support the Organization

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

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JA of Western New York Inc275 Oak Street Suite 222 Buffalo, NY 14203	16-0821488	501(c)(3)	49,254				To support the Organization
JA Worldwide1 Education Way Colorado Springs, CO 80906	27-3666259	501(c)(3)	79,750				To support the Organization

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

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Junior Achievement of Eastern Iowa Inc 324 3rd St SE Cedar Rapids, IA 52401	42-0919209	501(c)(3)	8,548				To support the Organization
Junior Achievement of West Virginia Inc 1700 MacCorkle Ave SE Charleston, WV 25314	55-0524771	501(c)(3)	19,452				To support the Organization

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JA of Central Carolinas Inc201 S Tryon St Charlotte, NC 28202	56-0672085	501(c)(3)	25,995				To support the Organization
Junior Achievement of Chattanooga Inc 5721 Marlin Ste 3400 Chattanooga, TN 37411	62-0636297	501(c)(3)	11,360				To support the Organization

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Junior Achievement of Greater St Louis Inc17339 N Outer Forty Chesterfield, MO 63005	43-0652112	501(c)(3)	100,439				To support the Organization
Junior Achievement of Chicago651 W Washington Blvd Chicago, IL 60661	36-2170141	501(c)(3)	263,115				To support the Organization

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Junior Achievement of OKI Partners Inc 644 Linn St Ste 1024 Cincinnati, OH 45203	32-0014307	501(c)(3)	10,059				To support the Organization
JA of Tampa Bay Inc 13805 58th St N Clearwater, FL 33760	59-1098499	501(c)(3)	58,163				To support the Organization

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JA of Greater Cleveland Inc1422 Euclid Avenue Cleveland, OH 44115	34-0733164	501(c)(3)	39,899				To support the Organization
Junior Achievement of East Tennessee Inc2135 N Charles G Seivers Clinton, TN 37716	62-0810145	501(c)(3)	34,818				To support the Organization

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

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Junior Achievement of South Florida Inc 1130 Coconut Crk Coconut Crk, FL 33066	59-0871446	501(c)(3)	22,624				To support the Organization
Junior Achievement of Southern Colorado419 West Bijou Colorado Springs, CO 80905	84-6009223	501(c)(3)	11,959				To support the Organization

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JA of Central South Carolina Inc301 Greystone Boulevard Columbia, SC 29210	57-0511131	501(c)(3)	18,320				To support the Organization
Junior Achievement of Central Ohio Inc 68 E 2nd Avenue Columbus, OH 43201	31-4385042	501(c)(3)	5,054				To support the Organization

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JA of East Central Illinois Inc788 North Sunnyside Road Decatur,IL 62522	37-0762052	501(c)(3)	7,260				To support the Organization
Junior Achievement - Rocky Mountain Inc1445 Market Suite 200 Denver,CO 80202	84-0430495	501(c)(3)	66,111				To support the Organization

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Junior Achievement of Central Iowa Inc 6100 Grand Avenue Des Moines, IA 50312	42-0759070	501(c)(3)	13,545				To support the Organization
JA of Southeastern Michigan Inc 577 E Larned Suite 200 Detroit, MI 48226	38-1348535	501(c)(3)	18,262				To support the Organization

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JA of Central New York Inc ShoppingTown Mall Dewitt, NY 13214	16-0915560	501(c)(3)	7,479				To support the Organization
JA of The Desert Southwest Inc150 S Alto Mesa Ste D El Paso, TX 79912	74-1565161	501(c)(3)	5,428				To support the Organization

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

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JA of Southwestern Indiana Inc431 E Diamond Avenue Evansville, IN 47711	35-6048156	501(c)(3)	6,722				To support the Organization
Junior Achievement of Northern Indiana Inc601 Noble Drive Fort Wayne, IN 46825	35-0922731	501(c)(3)	24,321				To support the Organization

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JA of The Chisholm Trail Inc6300 Ridglea Pl Fort Worth, TX 76116	75-0944915	501(c)(3)	16,683				To support the Organization
JA of Mahoning Valley Inc Northwood Center Girard, OH 44420	34-1714400	501(c)(3)	9,724				To support the Organization

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JA of Central N Carolina Inc3220 Northline Avenue Greensboro, NC 27408	56-0844838	501(c)(3)	14,021				To support the Organization
JA of Upstate South Carolina Inc530 Howell Rd Ste 103 Greenville, SC 29615	57-0547967	501(c)(3)	9,604				To support the Organization

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JA of Guam414 W Soledad ave Hagatna, Guam GQ	98-0031547	501(c)(3)	11,260				To support the Organization
JA of The Michigan Great Lakes Inc 2650 E Beltline SE Grnd Rpds, MI 49546	38-1557861	501(c)(3)	6,908				To support the Organization

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JA of Southwest New England Inc11 Asylum St Ste 601 Hartford, CT 06103	06-0665972	501(c)(3)	13,121				To support the Organization
Junior Achievement of Hawaii Inc2909 Waiialae Ave 10 Honolulu, HI 96826	99-0088861	501(c)(3)	14,474				To support the Organization

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JA of Southeast Texas Inc2115 East Governors Cir Houston,TX 77092	74-1153957	501(c)(3)	92,377				To support the Organization
Junior Achievement of Central Indiana Inc9449 Priority Way Indianapolis,IN 46240	35-1003695	501(c)(3)	9,800				To support the Organization

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Junior Achievement of North Florida Inc 4049 Woodcock Dr Jacksonville, FL 32207	59-1021800	501(c)(3)	28,778				To support the Organization
Junior Achievement of Middle America Inc 4049 Pennsylvania Ave Kansas Cty, MO 64111	44-0604809	501(c)(3)	28,308				To support the Organization

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Junior Achievement of Tri-Cities TNVA Inc330 Broad St Ste 1 Kingsport, TN 37660	62-0757847	501(c)(3)	12,550				To support the Organization
Junior Achievement of Southern Nevada Inc7220 S Cimarron Road Las Vegas, NV 89113	88-0354481	501(c)(3)	74,611				To support the Organization

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JA of Northeastern New York Inc8 Stanley Circle Latham,NY 12110	14-1429763	501(c)(3)	32,470				To support the Organization
Junior Achievement of The Bluegrass Inc 1092 Duval St Ste240 Lexington, KY 40515	61-0606480	501(c)(3)	27,088				To support the Organization

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Junior Achievement of Arkansas Inc 1501 N University Little Rock, AR 72207	71-0658775	501(c)(3)	31,245				To support the Organization
JA of Southern California Inc 6250 Forest Lawn Dr Los Angeles, CA 90068	95-1799192	501(c)(3)	96,241				To support the Organization

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Junior Achievement of Kentuckiana Inc 1401 W Muhammed Ali Louisville, KY 40203	61-0476694	501(c)(3)	98,191				To support the Organization
JA of The Upper Midwest Inc 1800 White Bear Ave N Maplewood, MN 55109	41-1424988	501(c)(3)	32,586				To support the Organization

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JA of Memphis and the Mid-South Inc 307 Madison Avenue Memphis,TN 38103	62-0549549	501(c)(3)	14,947				To support the Organization
Junior Achievement of Idaho Inc1303 E Central Dr Meridian,ID 83642	82-6008991	501(c)(3)	9,048				To support the Organization

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Junior Achievement of Wisconsin Inc 11111 W Liberty Dr Milwaukee, WI 53224	39-0826295	501(c)(3)	64,905				To support the Organization
Junior Achievement of the Heartland Inc 800 12th Avenue Moline, IL 61265	36-2684253	501(c)(3)	9,300				To support the Organization

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JA of Middle Tennessee Inc120 Powell Place Nashville, TN 37204	62-0582571	501(c)(3)	7,790				To support the Organization
JA of Southern Massachusetts Inc 227 Union Street New Bedford, MA 02740	04-3193575	501(c)(3)	6,405				To support the Organization

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JA of Greater New Orleans Inc5100 Orleans Avenue New Orleans, LA 70124	72-0469314	501(c)(3)	44,694				To support the Organization
Junior Achievement of New York Inc420 Lexington Ave New York, NY 10170	13-3031828	501(c)(3)	203,512				To support the Organization

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JA of Greater Hampton Roads Inc 6387 Center Drive Norfolk, VA 23502	54-0799839	501(c)(3)	11,900				To support the Organization
Junior Achievement of Greater Miami Inc 13490 NW 7 Avenue North Miami, FL 33168	59-0807486	501(c)(3)	139,956				To support the Organization

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JA of Southwest Connecticut Inc200 Connecticut Avenue Norwalk, CT 06854	06-0932913	501(c)(3)	29,924				To support the Organization
Junior Achievement of the Midlands Inc 13506 West Maple Road Omaha,NE 68164	47-0468426	501(c)(3)	7,471				To support the Organization

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Junior Achievement of Central Florida Inc2121 Camden Road Orlando, FL 328031487	59-0972112	501(c)(3)	18,723				To support the Organization
Junior Achievement of West Kentucky Inc1195 Wing Ave Owensboro, KY 42303	61-0564988	501(c)(3)	12,070				To support the Organization

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Junior Achievement of Central Maryland Inc10711 Red Run Blvd Owings Mills, MD 21117	52-0688275	501(c)(3)	93,980				To support the Organization
JA of Northwest Florida Inc1010 N 12th Ave Pensacola,FL 32501	59-0839555	501(c)(3)	7,594				To support the Organization

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Junior Achievement of Central Illinois Inc4450 N Prospect Peoria Heights, IL 61616	37-0657600	501(c)(3)	7,940				To support the Organization
JA of Western Pennsylvania Inc One Allegheny Sq Pittsburgh, PA 15212	25-0983059	501(c)(3)	10,804				To support the Organization

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JA of Oregon and SW Washington Inc 7830 SE Foster Road Portland, OR 97206	93-0384007	501(c)(3)	13,617				To support the Organization
JA of Maine Inc82 Elm Street Portland, ME 04101	01-0275159	501(c)(3)	10,402				To support the Organization

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Junior Achievement of New Jersey Inc 4365 Route 1 South Princeton, NJ 08540	22-1774147	501(c)(3)	99,472				To support the Organization
Junior Achievement of Rhode Island Inc 120 Waterman St Providence, RI 02906	05-0263443	501(c)(3)	8,905				To support the Organization

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JA of Eastern North Carolina Inc 4900 Waters Edge Drive Raleigh, NC 27606	56-1107715	501(c)(3)	9,706				To support the Organization
JA of Northern Nevada Inc 1005 Terminal Way Suite 106 Reno, NV 89502	88-6005167	501(c)(3)	9,986				To support the Organization

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Junior Achievement of Dallas Inc1201 Executive Dr W Richardson, TX 75081	75-0881589	501(c)(3)	81,471				To support the Organization
Junior Achievement of Central Virginia Inc7217 West Broad Street Richmond, VA 23294	54-0803325	501(c)(3)	21,867				To support the Organization

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JA of Southwest Virginia Inc3433 Brambleton Avenue SW Roanoke, VA 24018	54-0628293	501(c)(3)	6,357				To support the Organization
JA of Rochester New York Inc259 Monroe Ave Ste 108 Rochester, NY 14607	16-0956147	501(c)(3)	31,990				To support the Organization

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Junior Achievement of Sacramento Inc 3800 Watt Ave Ste 165 Sacramento,CA 95821	94-6080866	501(c)(3)	40,145				To support the Organization
JA of Northeast Michigan Inc1781 Fordney Street Saginaw,MI 48601	38-1746900	501(c)(3)	9,912				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 the Eastern Shore Inc200 West Main Street Salisbury, MI 21801	52-1461040	501(c)(3)	6,502				
Junior Achievement of Utah Inc515 East 100 S Salt Lake City, UT 84102	87-0225875	501(c)(3)	38,256				

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 Inc 403 E Ramsey ste 201 San Antonio, TX 78216	74-2061852	501(c)(3)	68,914				
JA of San Diego & Imperial Co Inc 4756 Mission Gorge Plc San Diego, CA 92120	95-1727087	501(c)(3)	32,240				

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 Washington Inc 1700 Westlake Ave N Seattle, WA 98109	91-0604913	501(c)(3)	58,006				
Junior Achievement of North Louisiana Inc 3825 Gilbert Dr Shreveport, LA 71104	72-0595081	501(c)(3)	9,122				

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 Dakota Inc 1000 North W Ave Sioux Falls, SD 57104	46-0306352	501(c)(3)	37,749				
JA of the Inland Northwest Inc421 W Riverside Ste 702 Spokane, WA 99201	91-0564208	501(c)(3)	6,284				

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 The Hudson Valley Inc12 Hamilton Pl Tarrytown, NY 10591	13-3001065	501(c)(3)	11,120				
Junior Achievement of Arizona Inc636 W Southern Avenue Tempe, AZ 852824508	86-0184349	501(c)(3)	74,427				

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 Kansas Inc501 SE Jefferson St Ste 22 Topeka, KS 66607	48-0731855	501(c)(3)	17,264				
Junior Achievement of Oklahoma Inc 3947 South 103rd E Ave Tulsa, OK 74146	73-0757053	501(c)(3)	28,678				

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 the Palm Beaches & Treasure Coast Inc6903 Vista Prkway N W Palm Beach, FL 33411	59-2333738	501(c)(3)	9,196				
JA of Northern California Inc3003 Oak Rd Ste 109 Walnut Creek, CA 94597	94-1322179	501(c)(3)	161,132				

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 Northern New England Inc400 Fifth Ave Ste 300 Waltham, MA 02451	04-2127020	501(c)(3)	98,842				
JA of Greater Washington Inc 1050 17th St NW Washington, DC 20036	54-0788947	501(c)(3)	63,581				

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 Road Wayne, PA 19087	23-1386172	501(c)(3)	65,510				
Junior Achievement of Delaware Inc522 S Walnut Street Wilmington, DE 19801	51-0078199	501(c)(3)	11,260				

Schedule J
(Form 990)

Compensation Information

OMB No 1545-0047

2011

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 Junior Achievement USA	Employer identification number 84-1267604
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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		
☐ First-class or charter travel		
☐ Travel for companions		
☐ Tax idemnification and gross-up payments		
☐ Discretionary spending account		
☐ Housing allowance or residence for personal use		
☐ Payments for business use of personal residence		
☒ Health or social club dues or initiation fees		
☐ Personal services (e g , maid, chauffeur, chef)		
1b 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	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?	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		
☒ Compensation committee		
☒ Independent compensation consultant		
☒ Form 990 of other organizations		
☐ Written employment contract		
☒ Compensation survey or study		
☒ 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		
4a Receive a severance payment or change-of-control payment?	Yes	
4b Participate in, or receive payment from, a supplemental nonqualified retirement plan?		No
4c Participate in, or receive payment from, an equity-based compensation arrangement?		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		
5a The organization?		No
5b Any related organization?		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		
6a The organization?		No
6b Any related organization?		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	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		No
9 If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53 4958-6(c)?		

Part II Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees. Use Schedule J-1 if additional space 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) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, columns (D) and (E) for that individual

(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 C Rush	(i) (ii)	480,179 0	177,545 0	4,356 0	38,949 0	1,008 0	702,037 0	72,725 0
(2) Jack E Kosakowski	(i) (ii)	301,695 0	98,864 0	9,223 0	82,555 0	20,253 0	512,590 0	40,496 0
(3) Timothy Armijo	(i) (ii)	139,518 0	27,986 0	1,576 0	37,090 0	16,172 0	222,342 0	11,074 0
(4) Cecil Thibodeaux	(i) (ii)	223,850 0	51,621 0	2,647 0	58,967 0	15,109 0	352,194 0	24,587 0
(5) Gary Blanchette	(i) (ii)	198,542 0	28,631 0	1,242 0	81,240 0	17,685 0	327,340 0	0 0
(6) John Box	(i) (ii)	162,901 0	9,967 0	2,847 0	33,777 0	14,462 0	223,954 0	12,812 0
(7) Susan Luu	(i) (ii)	180,897 0	25,718 0	735 0	19,065 0	17,517 0	243,932 0	0 0
(8) Howard Bartner	(i) (ii)	137,436 0	28,689 0	861 0	53,554 0	23,170 0	243,710 0	13,560 0
(9) Steve Schmidt	(i) (ii)	141,723 0	24,155 0	853 0	26,033 0	18,047 0	210,811 0	11,297 0
(10) Susan Kolon-Rachlis	(i) (ii)	217,110 0	17,178 0	0 0	0 0	11,464 0	245,752 0	0 0
(11) DONALD CREVELING	(i) (ii)	230,678	53,788	4,206	45,122	15,350	349,144	18,445

Part III **Supplemental 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 President & CEO 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 USA: 1. Reward for performance; 2. Provide reasonable and competitive pay packages with those offered to leaders of organizations comparable to JA USA in terms of size, 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 USA'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 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

2011

Open to Public
Inspection

Name of the organization Junior Achievement USA	Employer identification number 84-1267604
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Identifier	Return Reference	Explanation
ORGANIZATIONS MISSION CONT	PART III, LINE 1	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.

Identifier	Return Reference	Explanation
SIGNIFICANT CHANGES TO GOVERNING DOCUMENTS	PART VI, LINE 4	Ja Worldw ide (existing at 06/30/11) contributed the assets used to provide services to the international members to a new entity, then the existing legal entity changed its legal name to Junior Achievement USA (JA USA) JA USA will now serve offices in the United States The re-organization and name change are reflected in the amended articles of incorporation and bylaw s

Identifier	Return Reference	Explanation
MEMBERS	PART VI, LINE 6 & 7B	THE SOLE MEMBER OF THE ORGANIZATION IS JA WORLDWIDE, INC. APPROVAL MUST BE OBTAINED FROM THE MEMBER FOR THE FOLLOWING - AMENDMENT, MODIFICATION, OR RESTATEMENT OF THE ARTICLES OF INCORPORATION OR BYLAWS, - MERGER, CONSOLIDATION, REORGANIZATION, OR DISSOLUTION OF JUNIOR ACHIEVEMENT USA (JA USA), OR THE SALE, LEASE OR EXCHANGE, OR OTHER DISPOSITION, TRANSFER OR CONVEYANCE OF ALL OF SUBSTANTIALLY ALL OF ITS NET ASSETS, - ANY MATERIAL CHANGE IN ANY CURRENT NONPROFIT PURPOSES AND OBJECTIVES OF JA USA, - ENTERING INTO ANY OPERATING AGREEMENT BETWEEN JA USA AND ANY OF ITS LOCAL AREAS

Identifier	Return Reference	Explanation
DESCRIBE PROCESS TO REVIEW 990	PART VI, LINE 11B	The Form 990 is prepared by a third party and is reviewed 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 with the IRS.

Identifier	Return Reference	Explanation
DESCRIBE HOW CONFLICT OF INTEREST POLICY IS MONITORED & ENFORCED	PART VI, LINE 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, LINE 15A & 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 Reference	Explanation
DESCRIBE HOW DOCUMENTS ARE MADE AVAILABLE TO THE PUBLIC	PART VI, LINE 19	Junior Achievement, USA makes its financial statements, governing documents, and conflict of interest policy available to the public upon request

Identifier	Return Reference	Explanation
OTHER CHANGES TO NET ASSETS	PART XI, LINE 5	UNREALIZED LOSS (295,391) NET ASSET TRANSFER TO AFFILIATED ORGANIZATION (2,660,241) TOTAL (2,955,632)

Identifier	Return Reference	Explanation
COMPENSATION	PART VII	Compensation for most officers are for services provided to both Junior Achievement USA (JAUSA), and JA Worldwide (JAWW), an affiliated but unrelated organization for 990 purposes. Compensation for Sean Rush also includes services provided to both JAUSA, and JAWW. Because the compensation is reported on the 2011 calendar year, half of the compensation is allocable to JAUSA, and the other half to JAWW. Compensation deliberations take into account services provided to the filing organization and its affiliates. Revenue presented in the Form 990 does not include the revenue of the 121 JA affiliates who are part of the global JA network that JA Worldwide oversees. In FYE 2012, revenue of all affiliates totaled \$253 million.

Identifier	Return Reference	Explanation
CHANGES IN CONDUCTING PROGRAM SERVICES	PART III, LINE 3	Prior to July 1, 2011, Junior Achievement USA (formerly known as JA Worldwide) contained activities of both domestic and international operations. Effective July 1, 2011, the organization was restructured to bifurcate domestic activities from international activities. The international activities were transferred to JA Worldwide, Inc., a newly formed organization which is a separate legal/fiduciary regional operating center. Junior Achievement USA was established as the regional operating center for the United States and Middle East.

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) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) 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 Aijala Jr Director	20	X						0	0	0
Evelyn Angelle Director	20	X						0	0	0
Alan S Armstrong Director	20	X						0	0	0
Sandra Beach Lin Director	20	X						0	0	0
Mark Brenner Director	20	X						0	0	0
Catherine S Brune Treasurer	20	X		X				0	0	0
Chalres H Dana Director	20	X						0	0	0
Michael Deniszczuk Director	20	X						0	0	0
Lynne Ford Director	20	X						0	0	0
Elwood D Howse Jr Director	20	X						0	0	0
Clyde D Keaton Director	20	X						0	0	0
Larry Leva President	20	X		X				0	0	0
Kevin McKay Vice Chair	20	X		X				0	0	0
Paul E McKnight Director	20	X						0	0	0
Julie A Monaco Director	20	X						0	0	0
David Palenchar Director	20	X						0	0	0
Jonas Prising Secretary	20	X		X				0	0	0
Ed Rapp Chair	20	X		X				0	0	0
Robert Reeg Director	20	X						0	0	0
James Runnels Director	20	X						0	0	0
Lisa Sodeika Director	20	X						0	0	0
Albert E Suter Director	20	X						0	0	0
Thomas D Weldon Director	20	X						0	0	0
Richard A Woods Director	20	X						0	0	0
Gerry Czarnecki Director	20	X						0	0	0

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

(A) Name and Title	(B) Average hours per week	(C) Position (check all that apply)						(D) Reportable compensation from the organization (W-2/1099-MISC)	(E) Reportable compensation from related organizations (W-2/1099-MISC)	(F) Estimated amount of other compensation from the organization and related organizations
		Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former			
Julie Gordon Director	2 0	X						0	0	0
Clyde Keaton Director	2 0	X						0	0	0
James Rutrough Director	2 0	X						0	0	0
Sean C Rush Director	2 0	X						662,080	0	39,957
Jack E Kosakowski President & CEO	60 0	X		X				409,782	0	102,808
Timothy Armijo CFO	40 0			X				169,080	0	53,262
Cecil Thibodeaux EVP	40 0			X				278,118	0	74,076
Gary Blanchette SVP - Development	40 0			X				228,415	0	98,925
John Box SVP - Education	40 0			X				175,715	0	48,239
Susan Luu SVP- Business Improvement	40 0			X				207,350	0	36,582
DONALD CREVELING SVP - HUMAN RESOURCES	40 0			X				288,672		60,472
Howard Bartner SVP- US Operations	40 0				X			166,986	0	76,724
Steve Schmidt SVP- US Operations	40 0				X			166,731	0	44,080
Susan Kolon-Rachlis SVP - Brand Strategy & Comm	40 0				X			234,288	0	11,464