Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2011

For calendar year 2011, or tax year beginning 10/01 , 2011, and ending 9/30 , 2012

BURWEN EDUCATION FOUNDATION
1114 BLUE LAKE SQUARE
MOUNTAIN VIEW, CA 94040

A Employer identification number 77-0560492

B Telephone number (see the instructions) (650) 967-3403

C If exemption application is pending, check here ► [ ]

D 1 Foreign organizations, check here ► [ ]

2 Foreign organizations meeting the 85% test, check here and attach computation ► [ ]

E If private foundation status was terminated under section 507(b)(1)(A), check here ► [ ]

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

G Check all that apply [ ] Initial return [ ] Initial Return of a former public charity [ ] Final return [ ] Amended return [ ] Address change [ ] Name change

H Check type of organization [X] Section 501(c)(3) exempt private foundation [ ] Section 4947(a)(1) nonexempt charitable trust [ ] Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16) ► $ 380,370.

J Accounting method [X] Cash [ ] Accrual [ ] Other (specify) (Part I, column (d) must be on cash basis)

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Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a) (see instructions))	(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)
REVENUE				
1 Contributions, gifts, grants, etc, received (att sch)	20,134.			
2 Ck ► [ ] if the foundn is not req to att Sch B				
3 Interest on savings and temporary cash investments				
4 Dividends and interest from securities	7,865.	7,865.	7,865.	
5a Gross rents				
b Net rental income or (loss)				
6a Net gain/(loss) from sale of assets not on line 10	116,105.			
b Gross sales price for all assets on line 6a 280,410.				
7 Capital gain net income (from Part IV, line 2)		116,105.		
8 Net short-term capital gain				
9 Income modifications				
10a Gross sales less returns and allowances				
b Less Cost of goods sold				
c Gross profit/(loss) (att sch)				
11 Other income (attach schedule)				
12 **Total.** Add lines 1 through 11	144,104.	123,970.	7,865.	
OPERATING AND ADMINISTRATIVE EXPENSES				
13 Compensation of officers, directors, trustees, etc	0.			
14 Other employee salaries and wages				
15 Pension plans, employee benefits				
16a Legal fees (attach schedule)				
b Accounting fees (attach sch)				
c Other prof fees (attach sch)				
17 Interest				
18 Taxes (attach schedule)(see instrs) SEE STM 1	157.			157.
19 Depreciation (attach sch) and depletion				
20 Occupancy				
21 Travel, conferences, and meetings				
22 Printing and publications				
23 Other expenses (attach schedule) SEE STATEMENT 2	14,239.			15,605.
24 **Total operating and administrative expenses.** Add lines 13 through 23	14,396.			15,762.
25 Contributions, gifts, grants paid PART XV	106,613.			106,613.
26 **Total expenses and disbursements.** Add lines 24 and 25	121,009.	0.	0.	122,375.
27 Subtract line 26 from line 12:				
a **Excess of revenue over expenses and disbursements**	23,095.			
b **Net investment income** (if negative, enter -0-)		123,970.		
c **Adjusted net income** (if negative, enter -0-)			7,865.	

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BAA For Paperwork Reduction Act Notice, see instructions. TEEA0504L 12/05/11 Form **990-PF** (2011)

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Part II Balance Sheets

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

		Beginning of year (a) Book Value	End of year (b) Book Value	End of year (c) Fair Market Value
ASSETS	1 Cash – non-interest-bearing	28,736.	303,890.	303,890.
	2 Savings and temporary cash investments			
	3 Accounts receivable ►			
	Less allowance for doubtful accounts ►			
	4 Pledges receivable ►			
	Less allowance for doubtful accounts ►			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons (attach schedule) (see instructions)			
	7 Other notes and loans receivable (attach sch) ►			
	Less allowance for doubtful accounts ►			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments – U S and state government obligations (attach schedule) STATEMENT 3	162,727.	74,973.	76,480.
	b Investments – corporate stock (attach schedule)	164,305.		
	c Investments – corporate bonds (attach schedule)			
	11 Investments – land, buildings, and equipment basis ►			
	Less accumulated depreciation (attach schedule) ►			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
	14 Land, buildings, and equipment basis ►			
	Less accumulated depreciation (attach schedule) ►			
	15 Other assets (describe ►)			
	16 **Total assets** (to be completed by all filers – see the instructions Also, see page 1, item I)	355,768.	378,863.	380,370.
LIABILITIES	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ►)			
	23 **Total liabilities** (add lines 17 through 22)	0.	0.	
NET ASSETS OR FUND BALANCES	**Foundations that follow SFAS 117, check here ► ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ► X and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	355,768.	378,863.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances** (see instructions)	355,768.	378,863.	
	31 **Total liabilities and net assets/fund balances** (see instructions)	355,768.	378,863.	

Part III Analysis of Changes in Net Assets or Fund Balances

1	Total net assets or fund balances at beginning of year – Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	355,768.
2	Enter amount from Part I, line 27a	2	23,095.
3	Other increases not included in line 2 (itemize) ►	3	
4	Add lines 1, 2, and 3	4	378,863.
5	Decreases not included in line 2 (itemize) ►	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	378,863.

Part IV Capital Gains and Losses for Tax on Investment Income

	(a) List and describe the kind(s) of property sold (e g , real estate, 2-story brick warehouse, or common stock, 200 shares MLC Company)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a	775.000 ISHARES TR S&P 100 INDEX FD	P	10/27/08	5/24/12
b	688.000 ISHARES TR RUSSELL 200 GROWTH INDEX FD	P	10/27/08	5/24/12
c	376.000 SPDR S&P 500 ETF TR TR UNIT	P	10/27/08	5/24/12
d	367.000 SPDR S&P MIDCAP 400 ETF TR UNIT SER	P	10/27/08	5/24/12
e	1633.000 VANGUARD INTL EQUITY INDEX FDS MSCI	P	10/27/08	5/24/12

	(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a	46,709.		32,848.	13,861.
b	60,089.		32,853.	27,236.
c	49,633.		32,817.	16,816.
d	62,323.		32,859.	29,464.
e	61,656.		32,928.	28,728.

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

	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
a				13,861.
b				27,236.
c				16,816.
d				29,464.
e				28,728.

2	Capital gain net income or (net capital loss) — If gain, also enter in Part I, line 7; If (loss), enter -0- in Part I, line 7	2	116,105.
3	Net short-term capital gain or (loss) as defined in sections 1222(5) and (6). If gain, also enter in Part I, line 8, column (c) (see instructions) If (loss), enter -0- in Part I, line 8	3	0.

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

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

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

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

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (column (b) divided by column (c))
2010	125,704.	544,835.	0.230719
2009	78,519.	577,387.	0.135990
2008	130,180.	669,307.	0.194500
2007	93,634.	658,356.	0.142224
2006	106,182.	1,403,931.	0.075632

2	**Total** of line 1, column (d)	2	0.779065
3	Average distribution ratio for the 5-year base period — divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years	3	0.155813
4	Enter the net value of noncharitable-use assets for 2011 from Part X, line 5	4	357,699.
5	Multiply line 4 by line 3	5	55,734.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	1,240.
7	Add lines 5 and 6	7	56,974.
8	Enter qualifying distributions from Part XII, line 4	8	122,375.

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

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

1 a Exempt operating foundations described in section 4940(d)(2), check here ► [ ] and enter 'N/A' on line 1 Date of ruling or determination letter ________ (attach copy of letter if necessary – see instrs) b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► [X] and enter 1% of Part I, line 27b c All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)		1	1,240.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		2	0.
3 Add lines 1 and 2		3	1,240.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only Others enter -0-)		4	0.
5 **Tax based on investment income.** Subtract line 4 from line 3 If zero or less, enter -0-		5	1,240.
6 Credits/Payments:			
a 2011 estimated tax pmts and 2010 overpayment credited to 2011	6a		
b Exempt foreign organizations – tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c		
d Backup withholding erroneously withheld	6d		
7 Total credits and payments Add lines 6a through 6d		7	0.
8 Enter any **penalty** for underpayment of estimated tax Check here [X] if Form 2220 is attached		8	3.
9 **Tax due** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ►		9	1,243.
10 **Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ►		10	
11 Enter the amount of line 10 to be **Credited to 2012 estimated tax** ►	**Refunded** ►	11	

Part VII-A Statements Regarding Activities

		Yes	No
1 a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?	1a		X
b Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1b		X
If the answer is 'Yes' to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities			
c Did the foundation file **Form 1120-POL** for this year?	1c		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year **(1)** On the foundation ► $ 0. **(2)** On foundation managers ► $ 0.			
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► $ 0.			
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? *If 'Yes,' attach a detailed description of the activities*	2		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? *If 'Yes,' attach a conformed copy of the changes*	3		X
4a Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b If 'Yes,' has it filed a tax return on **Form 990-T** for this year?	4b	N/A	
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If 'Yes,' attach the statement required by General Instruction T*	5		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	6		X
7 Did the foundation have at least $5,000 in assets at any time during the year? *If 'Yes,' complete Part II, column (c), and Part XV*	7	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) ► CA			
b If the answer is 'Yes' to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by *General Instruction G? If 'No,' attach explanation*	8b	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2011 or the taxable year beginning in 2011 (see instructions for Part XIV)? *If 'Yes,' complete Part XIV*	9	X	
10 Did any persons become substantial contributors during the tax year? *If 'Yes,' attach a schedule listing their names and addresses*	10		X

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

			Yes	No
11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If 'Yes', attach schedule (see instructions)	11		X
12	Did the foundation make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes,' attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
	Website address ► N/A			
14	The books are in care of ► DAVID BURWEN Telephone no ► (650) 967-3403 Located at ► 1114 BLUE LAKE SQUARE MOUNTAIN VIEW CA ZIP + 4 ► 94040			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** – Check here N/A ► ☐ and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
16	At any time during calendar year 2011, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country?	16		X
	See the instructions for exceptions and filing requirements for Form TD F 90-22 1 If 'Yes,' enter the name of the foreign country ►			

Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required

	File Form 4720 if any item is checked in the 'Yes' column, unless an exception applies.			Yes	No
1 a	During the year did the foundation (either directly or indirectly)				
	(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	☐ Yes ☒ No			
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No			
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No			
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ No			
	(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	☐ Yes ☒ No			
	(6) Agree to pay money or property to a government official? (**Exception.** Check 'No' if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	☐ Yes ☒ No			
b	If any answer is 'Yes' to 1a(1)-(6), did **any** of the acts fail to qualify under the exceptions described in Regulations section 53 4941(d)-3 or in a current notice regarding disaster assistance (see instructions)?		1 b	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ► ☐				
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2011?		1 c		X
2	Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))				
a	At the end of tax year 2011, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2011? If 'Yes,' list the years ► 20__ , 20__ , 20__ , 20__	☐ Yes ☒ No			
b	Are there any years listed in 2a for which the foundation is **not** applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to **all** years listed, answer 'No' and attach statement – see instructions)		2b	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here ► 20__ , 20__ , 20__ , 20__				
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	☐ Yes ☒ No			
b	If 'Yes,' did it have excess business holdings in 2011 as a result of **(1)** any purchase by the foundation or disqualified persons after May 26, 1969, **(2)** the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or **(3)** the lapse of the 10-, 15-, or 20-year first phase holding period? *(Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2011)*		3b	N/A	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a		X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2011?		4b		X

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

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

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

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

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

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

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

b If any answer is 'Yes' to 5a(1)-(5), did **any** of the transactions fail to qualify under the exceptions described in Regulations section 53 4945 or in a current notice regarding disaster assistance (see instructions)? **5b** N/A

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

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

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

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

b Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract? **6b** X (No)

If 'Yes' to 6b, file Form 8870

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

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

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

1 List all officers, directors, trustees, foundation managers and their compensation (see instructions).

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation **(If not paid, enter -0-)**	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
DAVID BURWEN 1114 BLUE LAKE SQUARE MOUNTAIN VIEW, CA 94040	PRESIDENT 0	0.	0.	0.
SUSAN BURWEN 1114 BLUE LAKE SQUARE MOUNTAIN VIEW, CA 94040	SECRETARY-TR 0	0.	0.	0.
JENNIFER PENCE 898 WINDMILL PARK LANE MOUNTAIN VIEW, CA 94043	EXECUTIVE DI 0	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1— see instructions). If none, enter 'NONE.'

(a) Name and address of each employee paid more than $50,000	(b) Title, and average hours per week devoted to position	(c) Compensation	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
NONE				

Total number of other employees paid over $50,000 ► 0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
NONE		
Total number of others receiving over $50,000 for professional services ►		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc	Expenses
1 SCHOLARSHIPS TO 22 STUDENTS AND RELATED ADMIN EXPENSES	94,544.
2 REPLACE POWER POLES FOR MICRO HYDROELECTRIC POWER PLANT SERVING VILLAGE OF SOLOBAN, NEPAL; SCHOLARSHIPS AND SCHOOL DEVELOPMENT FOR CHILDREN OF SOLOBAN, NEPAL	13,830.
3	
4	

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

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

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc, purposes		
a	Average monthly fair market value of securities	1a	212,427.
b	Average of monthly cash balances	1b	150,719.
c	Fair market value of all other assets (see instructions)	1c	
d	**Total** (add lines 1a, b, and c)	1d	363,146.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation) — 1e: 0.		
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	363,146.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	5,447.
5	**Net value of noncharitable-use assets.** Subtract line 4 from line 3 Enter here and on Part V, line 4	5	357,699.
6	**Minimum investment return.** Enter 5% of line 5	6	17,885.

Part XI Distributable Amount (see instructions) (Section 4942(j)(3) and (j)(5) private operating foundations and certain foreign organizations check here ► [X] and do not complete this part.)

1	Minimum investment return from Part X, line 6 N/A	1	
2a	Tax on investment income for 2011 from Part VI, line 5 — 2a		
b	Income tax for 2011 (This does not include the tax from Part VI) — 2b		
c	Add lines 2a and 2b	2c	
3	Distributable amount before adjustments Subtract line 2c from line 1	3	
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	
6	Deduction from distributable amount (see instructions)	6	
7	**Distributable amount** as adjusted Subtract line 6 from line 5 Enter here and on Part XIII, line 1	7	

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc, purposes		
a	Expenses, contributions, gifts, etc — total from Part I, column (d), line 26	1a	122,375.
b	Program-related investments — total from Part IX-B	1b	
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc, purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	**Qualifying distributions.** Add lines 1a through 3b Enter here and on Part V, line 8, and Part XIII, line 4	4	122,375.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income Enter 1% of Part I, line 27b (see instructions)	5	1,240.
6	**Adjusted qualifying distributions.** Subtract line 5 from line 4	6	121,135.

Note. The amount on line 6 will be used in Part V, column (b), in subsequent years when calculating whether the foundation qualifies for the section 4940(e) reduction of tax in those years

Part XIII Undistributed Income (see instructions)

N/A

	(a) Corpus	(b) Years prior to 2010	(c) 2010	(d) 2011
1 Distributable amount for 2011 from Part XI, line 7				
2 Undistributed income, if any, as of the end of 2011:				
a Enter amount for 2010 only				
b Total for prior years 20___, 20___, 20___				
3 Excess distributions carryover, if any, to 2011:				
a From 2006				
b From 2007				
c From 2008				
d From 2009				
e From 2010				
f **Total** of lines 3a through e				
4 Qualifying distributions for 2011 from Part XII, line 4 ► $				
a Applied to 2010, but not more than line 2a				
b Applied to undistributed income of prior years (Election required — see instructions)				
c Treated as distributions out of corpus (Election required — see instructions)				
d Applied to 2011 distributable amount				
e Remaining amount distributed out of corpus				
5 Excess distributions carryover applied to 2011 *(If an amount appears in column (d), the same amount must be shown in column (a))*				
6 **Enter the net total of each column as indicated below:**				
a Corpus Add lines 3f, 4c, and 4e Subtract line 5				
b Prior years' undistributed income Subtract line 4b from line 2b				
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed				
d Subtract line 6c from line 6b Taxable amount — see instructions				
e Undistributed income for 2010 Subtract line 4a from line 2a Taxable amount — see instructions				
f Undistributed income for 2011 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2012				
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)				
8 Excess distributions carryover from 2006 not applied on line 5 or line 7 (see instructions)				
9 **Excess distributions carryover to 2012.** Subtract lines 7 and 8 from line 6a				
10 Analysis of line 9				
a Excess from 2007				
b Excess from 2008				
c Excess from 2009				
d Excess from 2010				
e Excess from 2011				

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

1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2011, enter the date of the ruling ►

b Check box to indicate whether the foundation is a private operating foundation described in section [X] 4942(j)(3) or [ ] 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2011	(b) 2010	(c) 2009	(d) 2008	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	7,865.	12,552.	14,617.	33,124.	68,158.
b 85% of line 2a	6,685.	10,669.	12,424.	28,155.	57,933.
c Qualifying distributions from Part XII, line 4 for each year listed	122,375.	125,831.	78,665.	134,119.	460,990.
d Amounts included in line 2c not used directly for active conduct of exempt activities	14,000.	18,500.	15,100.		47,600.
e Qualifying distributions made directly for active conduct of exempt activities Subtract line 2d from line 2c	108,375.	107,331.	63,565.	134,119.	413,390.
3 Complete 3a, b, or c for the alternative test relied upon:					
a 'Assets' alternative test – enter:					
(1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed	11,923.	18,161.	19,246.	22,310.	71,640.
c 'Support' alternative test – enter					
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year – see instructions.)

1 **Information Regarding Foundation Managers:**

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

DAVID BURWEN

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

NONE

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

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

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

SEE STATEMENT 4

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

SEE STATEMENT FOR LINE 2A

c Any submission deadlines

SEE STATEMENT FOR LINE 2A

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

SEE STATEMENT FOR LINE 2A

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
a *Paid during the year* SEE STATEMENT 5				
Total			► **3a**	106,613.
b *Approved for future payment*				
Total			► **3b**	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated	Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (See instructions)
	(a) Business code	(b) Amount	(c) Exclusion code	(d) Amount	
1 Program service revenue					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments					
4 Dividends and interest from securities			14	7,865.	
5 Net rental income or (loss) from real estate					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory			18	116,105.	
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue					
a					
b					
c					
d					
e					
12 Subtotal Add columns (b), (d), and (e)				123,970.	
13 Total. Add line 12, columns (b), (d), and (e)				13	123,970.

(See worksheet in line 13 instructions to verify calculations)

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

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes) (See instructions)
N/A	

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

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

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

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

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

b If 'Yes,' complete the following schedule

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

Sign Here

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

▶X Susan Jo Burwen X2/15/13 ▶X SECRETARY

Signature of officer or trustee | Date | Title

May the IRS discuss this return with the preparer shown below (see instructions)? ☒ Yes ☐ No

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☒ if self-employed	PTIN
BARBARA N. TAGGART	Barbara N. Taggart	2/11/13	☒	P00052582

Firm's name ► BARBARA N. TAGGART CPA — Firm's EIN ► none

Firm's address ► 312 COLFAX AVENUE GRASS VALLEY, CA 95945-6812 — Phone no (530) 273-2442

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

Schedule of Contributors

► **Attach to Form 990, Form 990-EZ, or Form 990-PF**

OMB No 1545-0047

2011

Name of the organization	Employer identification number
BURWEN EDUCATION FOUNDATION	77-0560492

Organization type (check one):

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

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

General Rule

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

Special Rules

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

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

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

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

Name of organization
BURWEN EDUCATION FOUNDATION

Employer identification number
77-0560492

Part I **Contributors** (see instructions) Use duplicate copies of Part I if additional space is needed

(a) Number	(b) Name, address, and ZIP + 4	(c) Total contributions	(d) Type of contribution
1	DAVID BURWEN 1114 BLUE LAKE SQUARE MOUNTAIN VIEW, CA 94040	$ 6,884.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
2	E4FC 27 MAIDEN LANE, 7TH FLOOR SAN FRANCISCO, CA 94108	$ 11,200.	Person [X] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)
		$	Person [ ] Payroll [ ] Noncash [ ] (Complete Part II if there is a noncash contribution)

Name of organization	Employer identification number
BURWEN EDUCATION FOUNDATION	77-0560492

Part II **Noncash Property** (see instructions) Use duplicate copies of Part II if additional space is needed

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

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

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

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

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

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

Name of organization: BURWEN EDUCATION FOUNDATION

Employer identification number: 77-0560492

Part III ***Exclusively*** **religious, charitable, etc, individual contributions to section 501(c)(7), (8), or (10) organizations that total more than $1,000 for the year.** Complete cols **(a)** through **(e)** and the following line entry

For organizations completing Part III, enter total of *exclusively* religious, charitable, etc, contributions of **$1,000 or less** for the year (Enter this information once See instructions) ► $ N/A

Use duplicate copies of Part III if additional space is needed

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held

(e) Transfer of gift

Transferee's name, address, and ZIP + 4	Relationship of transferor to transferee

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

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
FRANCHISE TAX BOARD	$ 10.			$ 10.
SECRETARY OF STATE FILING FEE	20.			20.
US TREASURY	127.			127.
TOTAL	$ 157.	$ 0.	$ 0.	$ 157.

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

	(A) EXPENSES PER BOOKS	(B) NET INVESTMENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
ADMINISTRATIVE	$ 2,312.			$ 2,312.
PRIOR PERIOD ADJUSTMENT	-1,366.			
REGISTRY OF CHARITABLE TRUSTS	25.			25.
STUDENT ACTIVITIES	10,333.			10,333.
TRAVEL	2,935.			2,935.
TOTAL	$ 14,239.	$ 0.	$ 0.	$ 15,605.

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

U.S. GOVERNMENT OBLIGATIONS	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
MORGAN STANLEY	COST	$ 74,973.	$ 76,480.
		$ 74,973.	$ 76,480.
	TOTAL	$ 74,973.	$ 76,480.

STATEMENT 4
FORM 990-PF, PART XV, LINE 2A-D
APPLICATION SUBMISSION INFORMATION

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

STATEMENT 5
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
ANGELICA MANTILLA ,	NONE	N/A	SCHOLARSHIP	$ 7,314.
CELIA HALSTED ,	NONE	N/A	SCHOLARSHIP	1,000.
JOSE ARREOLA ,	NONE	N/A	SCHOLARSHIP	13,824.
JESSICA HAMON ,	NONE	N/A	SCHOLARSHIP	4,023.
JONATHAN TORRES ,	NONE	N/A	SCHOLARSHIP	12,222.
NICK HAMBLETON-GARCIA ,	NONE	N/A	SCHOLARSHIP	15,750.
CHILDREN OF NEPAL ,	NONE	N/A	REPLACE POWER POLES FOR MICRO HYDROELECTRIC POWER PLANT FOR VILLAGE OF SOLOBAN, NEPAL; SCHOLARSHIPS AND SCHOOL DEVELOPMENT FOR CHILDREN OF SOLOBAN, NEPAL	13,830.
AMERICAN HIMALAYAN FOUNDATION 909 MONGOMERY ST, STE 400 SAN FRANCISCO, CA 94133	NONE	PUB CHAR	3 TEACHERS FOR SCHOOL IN SOLOBAN, NEPAL	6,000.
ASHRAYA FOUNDATION NEPAL ,	NONE	OPER FOUN	SCHOOL SUPPLIES FOR CHILDREN OF NEPAL	8,000.
BRIAN GUZMAN ,	NONE	N/A	SCHOLARSHIP	8,766.
CASSANDRA MAGANA ,	NONE	N/A	SCHOLARSHIP	5,077.
CARLOS MARQUEZ ,	NONE	N/A	SCHOLARSHIP	500.
FERNANDA RODRIGUEZ ,	NONE	N/A	SCHOLARSHIP	3,307.

STATEMENT 5 (CONTINUED)
FORM 990-PF, PART XV, LINE 3A
RECIPIENT PAID DURING THE YEAR

NAME AND ADDRESS	DONEE RELATIONSHIP	FOUND-ATION STATUS	PURPOSE OF GRANT	AMOUNT
IVAN ROLDAN ,	NONE	N/A	SCHOLARSHIP	$ 1,000.
JESSICA ALARCON ,	NONE	N/A	SCHOLARSHIP	500.
JESUS VALENCIA ,	NONE	N/A	SCHOLARSHIP	500.
LILLIE WILKES ,	NONE	N/A	SCHOLARSHIP	500.
MELISSA GOMEZ ,	NONE	N/A	SCHOLARSHIP	500.
NOVA RIVERA ,	NONE	N/A	SCHOLARSHIP	1,000.
PALOMA GALVAN ,	NONE	N/A	SCHOLARSHIP	500.
TIFFANY WOOTEN ,	NONE	N/A	SCHOLARSHIP	500.
VIRIA ELENA ,	NONE	N/A	SCHOLARSHIP	500.
VALERIA DOMINGUEZ ,	NONE	N/A	SCHOLARSHIP	500.
YVETTE NAVA ,	NONE	N/A	SCHOLARSHIP	500.
BRYAN MEDINA ,	NONE	N/A	SCHOLARSHIP	500.
			TOTAL	$ 106,613.

Scholarship Application Form

Name ______________________________ Social Security #__________
Last (Family) First Middle

Home Address ______________________________
Number and Street (area code) Home Phone

____
City State Zip Code (area code) Cell Phone

Place of Birth ______________________________ Email ______________
City State Country

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

If not US Citizen. Country of Citizenship. ____________________

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

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

Parents' or Guardians Name(s) ______________________________

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

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

TO ALL CANDIDATES FOR SCHOLARSHIP

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

V3/24/09

ATTACHMENT : STATEMENT 4

FINANCIAL INFORMATION

Number of dependents at home. ________________
Number of brothers/sisters currently in college ______________

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

If home is owned

Estimated fair market value ____________________

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

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

Parents' or Guardians' Gross Annual Income latest year $________________
Parents' or Guardians' Gross Annual Income previous year: $________________
Student's Gross Annual Income latest year. $____________________
Student's Gross Annual Income previous year $____________________

Father's or Guardian's Current Occupation ____________________________ # of years:______
Father's or Guardian's Previous Occupation.____________________________# of years:______
Mother s or Guardian's Current Occupation: ____________________________ # of years:______
Mother s or Guardian's Previous Occupation ____________________________# of years.______

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

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

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

______________________________ ______________________
Signature of Parent or Guardian Date

______________________________ ______________________
Signature of Applicant Date

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

School	Location	Dates of Attendance

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

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

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

3. Junior Year Courses

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

First Semester	Second Semester

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

5. **Extracurricular and Personal Activities**

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

Include

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

6. **Work Experience**

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

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

To what use have you put your earnings?____

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

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

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

8. Application Questions

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

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

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

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

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

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

8.6 What is your definition of success in life?

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

9. Essay

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

Applicant's Name ______________________

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

Signature ____ Date. ______________

11. Mentoring Agreement

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

Signature: ____ Date ______________

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

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

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

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

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

- Enroll in a four-year college during the academic year following high school graduation.
- Pursue a full-time academic course of study
- Maintain a minimum GPA of 2 5.
- Remain on-track for graduation in an academic major
- Participate in the mentoring program by:
  -accepting mentoring, especially during freshman and sophomore years
  -becoming a mentor to other scholarship recipients beginning in the junior year
  -attending annual BEF meetings

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

Signature ____ Date ______________

SUBMISSION INSTRUCTIONS AND CHECKLIST

In addition to this application form, please submit:

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

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

WHERE TO SUBMIT THE APPLICATION.

Submit the application to the AVID coordinator at your high school.

WHEN TO SUBMIT THE APPLICATION

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

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

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