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Form 990



Department of the Treasury  
Internal Revenue Service

Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except private foundations)

Do not enter social security numbers on this form as it may be made public

Information about Form 990 and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990)

OMB No 1545-0047

2014

Open to Public Inspection

A For the 2014 calendar year, or tax year beginning 01-01-2014 , and ending 12-31-2014

<b>B</b> Check if applicable <input type="checkbox"/> Address change  <input type="checkbox"/> Name change  <input type="checkbox"/> Initial return  <input type="checkbox"/> Final return/terminated  <input type="checkbox"/> Amended return  <input type="checkbox"/> Application pending	<b>C</b> Name of organization EDISON INNOVATION FOUNDATION		<b>D</b> Employer identification number  22-3442892
	Doing business as		
	Number and street (or P O box if mail is not delivered to street address) Room/suite 1 RIVERFRONT PLAZA 3RD FLOOR		E Telephone number  (973) 648-0500
	City or town, state or province, country, and ZIP or foreign postal code NEWARK, NJ 07102		<b>G</b> Gross receipts \$ 577,240
	<b>F</b> Name and address of principal officer JOHN P KEEGAN 18 SOMERSET DR RUMSON, NJ 07760		
<b>I</b> Tax-exempt status <input checked="" type="checkbox"/> 501(c)(3) <input type="checkbox"/> 501(c) ( ) <input type="checkbox"/> (insert no ) <input type="checkbox"/> 4947(a)(1) or <input type="checkbox"/> 527		<b>H(a)</b> Is this a group return for subordinates? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
<b>J</b> Website: <b>WWW</b> THOMASEDISON ORG		<b>H(b)</b> Are all subordinates included? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "No," attach a list (see instructions)	
		<b>H(c)</b> Group exemption number <b>▶</b>	
<b>K</b> Form of organization <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Trust <input type="checkbox"/> Association <input type="checkbox"/> Other <b>▶</b>			<b>L</b> Year of formation 1996
			<b>M</b> State of legal domicile NJ

Part I		Summary	
Activities & Governance	<b>1</b> Briefly describe the organization’s mission or most significant activities TO PRESERVE AND PROMOTE THE HISTORICAL FACILITIES AND PAPERS OF THOMAS EDISON WHERE AND IN WHICH HE INVENTED THE PRODUCTS THAT SHAPED THE MODERN WORLD,TO BENEFIT MINORITIES AND CHILDREN PROVIDING THE NECESSARY SKILLS TO PURSUE CAREERS IN SCIENCE AND TECHNOLOGY		
	<b>2</b> Check this box <input type="checkbox"/> if the organization discontinued its operations or disposed of more than 25% of its net assets		
Revenue	<b>3</b> Number of voting members of the governing body (Part VI, line 1a) . . . . .	<b>3</b>	5
	<b>4</b> Number of independent voting members of the governing body (Part VI, line 1b) . . . . .	<b>4</b>	2
	<b>5</b> Total number of individuals employed in calendar year 2014 (Part V, line 2a) . . . . .	<b>5</b>	3
	<b>6</b> Total number of volunteers (estimate if necessary) . . . . .	<b>6</b>	1
	<b>7a</b> Total unrelated business revenue from Part VIII, column (C), line 12 . . . . .	<b>7a</b>	0
	<b>b</b> Net unrelated business taxable income from Form 990-T, line 34 . . . . .	<b>7b</b>	
Expenses	<b>8</b> Contributions and grants (Part VIII, line 1h) . . . . .	<b>Prior Year</b>	<b>Current Year</b>
	<b>9</b> Program service revenue (Part VIII, line 2g) . . . . .	311,747	433,406
	<b>10</b> Investment income (Part VIII, column (A), lines 3, 4, and 7d ) . . . . .	45,287	38,250
	<b>11</b> Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	1,400	0
	<b>12</b> Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12) . . . . .	358,434	471,656
	<b>13</b> Grants and similar amounts paid (Part IX, column (A), lines 1–3 ) . . . . .	12,500	43,070
	<b>14</b> Benefits paid to or for members (Part IX, column (A), line 4) . . . . .		0
	<b>15</b> Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	394,378	390,898
Net Assets or Fund Balances	<b>16a</b> Professional fundraising fees (Part IX, column (A), line 11e) . . . . .		0
	<b>b</b> Total fundraising expenses (Part IX, column (D), line 25) <b>▶</b> 128,435		
	<b>17</b> Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e) . . . . .	825,886	193,978
	<b>18</b> Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	1,232,764	627,946
	<b>19</b> Revenue less expenses Subtract line 18 from line 12 . . . . .	-874,330	-156,290
Net Assets or Fund Balances	<b>Beginning of Current Year</b>		<b>End of Year</b>
	<b>20</b> Total assets (Part X, line 16) . . . . .	2,727,595	2,682,243
	<b>21</b> Total liabilities (Part X, line 26) . . . . .	32,544	36,124
	<b>22</b> Net assets or fund balances Subtract line 21 from line 20 . . . . .	2,695,051	2,646,119

Part II Signature Block

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 officer) is based on all information of which preparer has any knowledge

Sign Here	<div>*****</div> <div>Signature of officer</div>	<div>2015-05-15</div> <div>Date</div>			
	<div>JOHN P KEEGAN CHAIRMAN AND PRES</div> <div>Type or print name and title</div>				
Paid Preparer Use Only	Print/Type preparer's name ROBERT S KRIM	Preparer's signature ROBERT S KRIM	Date	Check <input type="checkbox"/> if self-employed	PTIN P00012597
	Firm's name <b>▶</b> KRIM LANDAU LLC			Firm's EIN <b>▶</b>	
	Firm's address <b>▶</b> 518 PROSPECT AVE  LITTLE SILVER, NJ 07739			Phone no (732) 945-7600	

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

Part III

Statement of Program Service Accomplishments

Check if Schedule O contains a response or note to any line in this Part III

1

Briefly describe the organization's mission

TO PRESERVE AND PROMOTE THE HISTORICAL FACILITIES AND PAPERS OF THOMAS EDISON WHERE AND IN WHICH HE INVENTED THE PRODUCTS THAT SHAPED THE MODERN WORLD,TO BENEFIT MINORITIES AND CHILDREN PROVIDING THE NECESSARY SKILLS TO PURSUE CAREERS IN SCIENCE AND TECHNOLOGY

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 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 \$

43,070

including grants of \$

(Revenue \$

)

NATIONAL GALLERY OF YOUNG INVENTORS1 EIF AND THE NATIONAL GALLERY FOR AMERICAS YOUNG INVENTORS TM CONTINUE TO HONOR WINNERS WITH TOMMY AWARDS TO CELEBRATE YOUNG INVENTORS WHO SHOW OUTSTANDING INVENTIVE AND CREATIVITY TALENT PLEASE SEE CONTINUATION OF SCHEDULE O

4b

(Code)

(Expenses \$

18,980

including grants of \$

(Revenue \$

)

EIF'S PRIMARY GOAL IS TO RAISE \$90 MILLION FOR THE RESTORATION AND UPKEEP OF EDISON'S LEGACY THROUGHOUT AMERICA ON OCTOBER 9TH, 2009, THE LEGENDARY EDISON LABS IN WEST ORANGE, NJ OPENED AFTER MORE THAN FIVE YEARS OF MAJOR RENOVATIONS THESE BUILDINGS WERE IN CRITICAL NEED OF REPAIR, AND THE COLLECTIONS INCLUDING, NOTEBOOKS, EARLY PROTOTYPES, AND THOUSANDS OF EARLY RECORDINGS WERE IN DANGER OR BEING LOST DUE TO DETERIORATION THE INITIAL FOCUS OF THIS CAMPAIGN WAS TO SUPPORT THE NEWLY RENAMED THOMAS EDISON NATIONAL HISTORICAL PARK("TENHP") AND ASSOCIATED EDUCATIONAL AND RESEARCH EFFORTS IN GENERAL HOWEVER, DURING THIS INITIAL PHASE, EIF IS ALSO WORKING ON INDIVIDUAL PUBLIC SECTOR PROJECTS AS WELL AS FORMING ALLIANCES WITH OTHER ORGANIZATIONS AND FOUNDATIONS IN ORDER TO ACHIEVE EDUCATIONAL INITIATIVES SOME RECENT PUBLIC SECTOR WORK IS DESCRIBED IN SECTION BELOW (CONTINUED ON SCH O)

4c

(Code)

(Expenses \$

including grants of \$

(Revenue \$

)

PLEASE SEE CONTINUATION OF SCHEDULE O

4d

Other program services (Describe in Schedule O )

(Expenses \$

including grants of \$

(Revenue \$

)
















4e

Total program service expenses

62,050

Part IV

Checklist of Required Schedules

	Yes	No
1 Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)? If "Yes," complete Schedule A 	1 Yes	
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)? 	2 Yes	
3 Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If "Yes," complete Schedule C, Part I	3	No
4 <b>Section 501(c)(3) organizations.</b> Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? If "Yes," complete Schedule C, Part II	4	No
5 Is the organization a section 501(c)(4), 501(c)(5), or 501(c)(6) organization that receives membership dues, assessments, or similar amounts as defined in Revenue Procedure 98-19? If "Yes," complete Schedule C, Part III	5	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 	6	No
7 Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If "Yes," complete Schedule D, Part II 	7	No
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III 	8	No
9 Did the organization report an amount in Part X, line 21 for escrow or custodial account liability, serve as a custodian for amounts not listed in Part X, or provide credit counseling, debt management, credit repair, or debt negotiation services? If "Yes," complete Schedule D, Part IV 	9	No
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 	10	No
11 If the organization's answer to any of the following questions is "Yes," then complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable		
a Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If "Yes," complete Schedule D, Part VI 	11a Yes	
b Did the organization report an amount for investments—other securities in Part X, line 12 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VII 	11b	No
c Did the organization report an amount for investments—program related in Part X, line 13 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part VIII 	11c	No
d Did the organization report an amount for other assets in Part X, line 15 that is 5% or more of its total assets reported in Part X, line 16? If "Yes," complete Schedule D, Part IX 	11d	No
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X 	11e 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 	11f	No
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII 	12a Yes	
b Was the organization included in consolidated, independent audited financial statements for the tax year? If "Yes," and if the organization answered "No" to line 12a, then completing Schedule D, Parts XI and XII is optional 	12b	No
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13	No
14a Did the organization maintain an office, employees, or agents outside of the United States?	14a	No
b Did the organization have aggregate revenues or expenses of more than \$10,000 from grantmaking, fundraising, business, investment, and program service activities outside the United States, or aggregate foreign investments valued at \$100,000 or more? If "Yes," complete Schedule F, Parts I and IV	14b	No
15 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of grants or other assistance to or for any foreign organization? If "Yes," complete Schedule F, Parts II and IV	15	No
16 Did the organization report on Part IX, column (A), line 3, more than \$5,000 of aggregate grants or other assistance to or for foreign individuals? If "Yes," complete Schedule F, Parts III and IV	16	No
17 Did the organization report a total of more than \$15,000 of expenses for professional fundraising services on Part IX, column (A), lines 6 and 11e? If "Yes," complete Schedule G, Part I (see instructions)	17	No
18 Did the organization report more than \$15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If "Yes," complete Schedule G, Part II	18	No
19 Did the organization report more than \$15,000 of gross income from gaming activities on Part VIII, line 9a? If "Yes," complete Schedule G, Part III	19	No
20a Did the organization operate one or more hospital facilities? If "Yes," complete Schedule H	20a	No
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?	20b	

Part IV

Checklist of Required Schedules (continued)

21	Did the organization report more than \$5,000 of grants or other assistance to any domestic organization or domestic government on Part IX, column (A), line 1? If "Yes," complete Schedule I, Parts I and II . . . . .	21	Yes	
22	Did the organization report more than \$5,000 of grants or other assistance to or for domestic individuals on Part IX, column (A), line 2? If "Yes," complete Schedule I, Parts I and III . . . . .	22	Yes	
23	Did the organization answer "Yes" to Part VII, Section A, line 3, 4, or 5 about compensation of the organization's current and former officers, directors, trustees, key employees, and highest compensated employees? If "Yes," complete Schedule J . . . . .	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? If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a . . . . .	24a		No
b	Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception? . . . .	24b		No
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		No
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year? . . . .	24d		No
25a	<b>Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.</b> Did the organization engage in an excess benefit transaction with a disqualified person during the year? If "Yes," complete Schedule L, Part 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? If "Yes," complete Schedule L, Part I . . . . .	25b		No
26	Did the organization report any amount on Part X, line 5, 6, or 22 for receivables from or payables to any current or former officers, directors, trustees, key employees, highest compensated employees, or disqualified persons? If "Yes," complete Schedule L, Part II . . . . .	26		No
27	Did the organization provide a grant or other assistance to an officer, director, trustee, key employee, substantial contributor or employee thereof, a grant selection committee member, or to a 35% controlled entity or family member of any of these persons? If "Yes," complete Schedule L, Part III . . . . .	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? If "Yes," complete Schedule L, Part IV . . . . .	28a		No
b	A family member of a current or former officer, director, trustee, or key employee? If "Yes," complete Schedule L, Part IV . . . . .	28b		No
c	An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? If "Yes," complete Schedule L, Part IV . . . . .	28c		No
29	Did the organization receive more than \$25,000 in non-cash contributions? If "Yes," complete Schedule M . . . .	29		No
30	Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? If "Yes," complete Schedule M . . . . .	30		No
31	Did the organization liquidate, terminate, or dissolve and cease operations? If "Yes," complete Schedule N, Part I . . . . .	31		No
32	Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? If "Yes," complete Schedule N, Part II . . . . .	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? If "Yes," complete Schedule R, Part I . . . . .	33		No
34	Was the organization related to any tax-exempt or taxable entity? If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1 . . . . .	34		No
35a	Did the organization have a controlled entity within the meaning of section 512(b)(13)?	35a		No
b	If "Yes" to line 35a, did the organization receive any payment from or engage in any transaction with a controlled entity within the meaning of section 512(b)(13)? If "Yes," complete Schedule R, Part V, line 2 . . . . .	35b		No
36	<b>Section 501(c)(3) organizations.</b> Did the organization make any transfers to an exempt non-charitable related organization? If "Yes," complete Schedule R, Part V, line 2 . . . . .	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? If "Yes," complete Schedule R, Part VI	37		No
38	Did the organization complete Schedule O and provide explanations in Schedule O for Part VI, lines 11b and 19? <b>Note.</b> All Form 990 filers are required to complete Schedule O . . . . .	38	Yes	

Part V

Statements Regarding Other IRS Filings and Tax Compliance

Check if Schedule O contains a response or note to any line in this Part V

		Yes	No
1a	Enter the number reported in Box 3 of Form 1096. Enter -0- if not applicable.		
1b	Enter the number of Forms W-2G included in line 1a. Enter -0- if not applicable.		
1c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	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.		
2b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? <b>Note.</b> If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions).	Yes	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		No
3b	If "Yes," has it filed a Form 990-T for this year? If "No" to line 3b, provide an explanation in Schedule O.		No
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?		No
b	If "Yes," enter the name of the foreign country: See instructions for filing requirements for FinCEN Form 114, Report of Foreign Bank and Financial Accounts (FBAR).		
5a	Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?		No
5b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		No
5c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?		
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 as charitable contributions?		No
6b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
7	<b>Organizations that may receive deductible contributions under section 170(c).</b>		
7a	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?		No
7b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
7c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		No
7d	If "Yes," indicate the number of Forms 8282 filed during the year.		0
7e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		No
7f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?		No
7g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		No
7h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		No
8	<b>Sponsoring organizations maintaining donor advised funds.</b> Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?		No
9a	Did the sponsoring organization make any taxable distributions under section 4966?		No
9b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		No
10	<b>Section 501(c)(7) organizations.</b> Enter		
10a	Initiation fees and capital contributions included on Part VIII, line 12.		
10b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.		
11	<b>Section 501(c)(12) organizations.</b> Enter		
11a	Gross income from members or shareholders.		
11b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them).		
12a	<b>Section 4947(a)(1) non-exempt charitable trusts.</b> Is the organization filing Form 990 in lieu of Form 1041?		No
12b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.		
13	<b>Section 501(c)(29) qualified nonprofit health insurance issuers.</b>		
13a	Is the organization licensed to issue qualified health plans in more than one state? <b>Note.</b> See the instructions for additional information the organization must report on Schedule O.		No
13b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans.		
13c	Enter the amount of reserves on hand.		
14a	Did the organization receive any payments for indoor tanning services during the tax year?		No
14b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O.		

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 or note to any line 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 . . . . .	5	
	If there are material differences in voting rights among members of the governing body, or if the governing body delegated broad authority to an executive committee or similar committee, explain in Schedule O		
1b	Enter the number of voting members included in line 1a, above, who are independent . . . . .	2	
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	Yes
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person? . . . . .	3	No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed? . . . . .	4	No
5	Did the organization become aware during the year of a significant diversion of the organization's assets? . . . . .	5	No
6	Did the organization have members or stockholders? . . . . .	6	No
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
7b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body? . . . . .	7b	No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following		
8a	a The governing body? . . . . .	8a	Yes
8b	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	No
10b	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	
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form? . . . . .	11a	No
	b Describe in Schedule O the process, if any, used by the organization to review this Form 990 . . . . .		
12a	Did the organization have a written conflict of interest policy? If "No," go to line 13 . . . . .	12a	Yes
12b	b Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts? . . . . .	12b	Yes
12c	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	No
14	Did the organization have a written document retention and destruction policy? . . . . .	14	Yes
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?		
15a	a The organization's CEO, Executive Director, or top management official . . . . .	15a	Yes
15b	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
16b	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	NJ	
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. <input type="checkbox"/> Own website <input type="checkbox"/> Another's website <input checked="" type="checkbox"/> Upon request <input type="checkbox"/> Other (explain in Schedule O)		
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 during the tax year		
20	State the name, address, and telephone number of the person who possesses the organization's books and records JOHN P. KEEGAN 1 RIVERFRONT PLAZA NEWARK, NJ 07102 (973) 648-0500		

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

Check if Schedule O contains a response or note to any line in this Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees

**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 all of the organization's **current** officers, directors, trustees (whether individuals or organizations), regardless of amount of compensation. Enter -0- in columns (D), (E), and (F) if no compensation was paid.
- List all of the organization's **current** key employees, if any. See instructions for definition of "key employee."
- List the organization's five **current** highest compensated employees (other than an officer, director, trustee or key employee) who received reportable compensation (Box 5 of Form W-2 and/or Box 7 of Form 1099-MISC) of more than \$100,000 from the organization and any related organizations.
- List all of the organization's **former** officers, key employees, or highest compensated employees who received more than \$100,000 of reportable compensation from the organization and any related organizations.
- List all of the organization's **former directors or trustees** that received, in the capacity as a former director or trustee of the organization, more than \$10,000 of reportable compensation from the organization and any related organizations.

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 organization compensated any current officer, director, or trustee

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(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			
(1) JOHN P KEEGAN ..... Chairman, Prsdnt	30.00 ..... 0.00	X		X				185,640	0	0
(2) THOMAS UNGERLAND ..... Exec Vice Pres	20.00 ..... 0.00	X		X				50,000	0	0
(3) JAMES HOWE ..... Trustee	2.00 ..... 0.00	X						0	0	0
(4) WADE KNOWLES ..... Vice President	1.00 ..... 0.00	X		X				10,600	0	0
(5) GEORGE Q KEEGAN ..... Treasurer/Secr	2.00 ..... 0.00	X		X				22,600	0	0

Part VII

Section A. Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

(A) Name and Title	(B) Average hours per week (list any hours for related organizations below dotted line)	(C) Position (do not check more than one box, unless person is both an officer and a director/trustee)						(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			

1b	Sub-Total . . . . .	▶			
c	Total from continuation sheets to Part VII, Section A . . . . .	▶			
d	Total (add lines 1b and 1c) . . . . .	▶	268,840		

2 Total number of individuals (including but not limited to those listed above) who received more than \$100,000 of reportable compensation from the organization▶1

		Yes	No
3	Did the organization list any <b>former</b> officer, director or trustee, key employee, or highest compensated employee on line 1a? <i>If "Yes," complete Schedule J for such individual</i> . . . . .	3	No
4	For any individual listed on line 1a, is the sum of reportable compensation and other compensation from the organization and related organizations greater than \$150,000? <i>If "Yes," complete Schedule J for such individual</i> . . . . .	4	Yes
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? <i>If "Yes," complete Schedule J for such person</i> . . . . .	5	No

Section B. Independent Contractors

1 Complete this table for your five highest compensated independent contractors that received more than \$100,000 of compensation from the organization Report compensation for the calendar year ending with or within the organization's tax year

(A) Name and business address	(B) Description of services	(C) Compensation
NONE		

2 Total number of independent contractors (including but not limited to those listed above) who received more than \$100,000 of compensation from the organization ▶0

Part VIII

Statement of Revenue

Check if Schedule O contains a response or note to any line in this Part VIII

			(A) Total revenue	(B) Related or exempt function revenue	(C) Unrelated business revenue	(D) Revenue excluded from tax under sections 512-514
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				
	f	All other contributions, gifts, grants, and similar amounts not included above 1f	433,406			
	g	Noncash contributions included in lines 1a-1f \$				
	h	Total. Add lines 1a-1f . . . . .	433,406			
Program Service Revenue	2a	Business Code				
	b					
	c					
	d					
	e					
	f	All other program service revenue				
	g	Total. Add lines 2a-2f . . . . .	0			
	Other Revenue	3	Investment income (including dividends, interest, and other similar amounts) . . . . .	34,981		
4		Income from investment of tax-exempt bond proceeds . . . . .	0			
5		Royalties . . . . .	0			
6a		Gross rents				
b		Less rental expenses				
c		Rental income or (loss)				
d		Net rental income or (loss) . . . . .	0			
7a		Gross amount from sales of assets other than inventory	108,853			
b		Less cost or other basis and sales expenses	105,584			
c		Gain or (loss)	3,269			
d		Net gain or (loss) . . . . .	3,269			3,269
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 . . . . .				
b		Less direct expenses . . . . .				
c		Net income or (loss) from gaming activities . . . . .	0			
10a		Gross sales of inventory, less returns and allowances . . . . .				
b		Less cost of goods sold . . . . .				
c		Net income or (loss) from sales of inventory . . . . .	0			
Miscellaneous Revenue		Business Code				
11a						
b						
c						
d	All other revenue . . . . .					
e	Total. Add lines 11a-11d . . . . .	0				
12	Total revenue. See Instructions . . . . .	471,656				38,250

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)

Check if Schedule O contains a response or note to any line 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 domestic organizations and domestic governments See Part IV, line 21 . . . . .	24,194	24,194		
2	Grants and other assistance to domestic individuals See Part IV, line 22 . . . . .	18,876	18,876		
3	Grants and other assistance to foreign organizations, foreign governments, and foreign individuals See Part IV, lines 15 and 16 . . . . .	0			
4	Benefits paid to or for members . . . . .	0			
5	Compensation of current officers, directors, trustees, and key employees . . . . .	268,840		185,640	83,200
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 . . . . .	96,215		96,215	
8	Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions) . . . . .	0			
9	Other employee benefits . . . . .	7,352		7,352	
10	Payroll taxes . . . . .	18,491		18,491	
11	Fees for services (non-employees)				
a	Management . . . . .	0			
b	Legal . . . . .	3,939		3,939	
c	Accounting . . . . .	23,252		23,252	
d	Lobbying . . . . .	0			
e	Professional fundraising services See Part IV, line 17	0			
f	Investment management fees . . . . .	0			
g	Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O) . . . . .	0			
12	Advertising and promotion . . . . .	5,611			5,611
13	Office expenses . . . . .	721		721	
14	Information technology . . . . .	0			
15	Royalties . . . . .	0			
16	Occupancy . . . . .	63,753		63,753	
17	Travel . . . . .	17,231			17,231
18	Payments of travel or entertainment expenses for any federal, state, or local public officials . . . . .	0			
19	Conferences, conventions, and meetings . . . . .	0			
20	Interest . . . . .	0			
21	Payments to affiliates . . . . .	0			
22	Depreciation, depletion, and amortization . . . . .	0			
23	Insurance . . . . .	5,778		5,778	
24	Other expenses Itemize expenses not covered above (List miscellaneous expenses in line 24e If line 24e amount exceeds 10% of line 25, column (A) amount, list line 24e expenses on Schedule O )				
a	MEETINGS/CONFERENCES	25,000		25,000	
b	HISTORIC SITE RESTORATION	18,980	18,980		
c	Printing and Publications	10,464			10,464
d	CONSULTANTS	9,682			9,682
e	All other expenses	9,567		7,320	2,247
25	Total functional expenses. Add lines 1 through 24e	627,946	62,050	437,461	128,435
26	Joint costs. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation Check here <input type="checkbox"/> if following SOP 98-2 (ASC 958-720)				

Part X

Balance Sheet

Check if Schedule O contains a response or note to any line in this Part X

					(A) Beginning of year		(B) End of year
Assets	1	Cash—non-interest-bearing . . . . .				1	0
	2	Savings and temporary cash investments . . . . .			435,543	2	577,592
	3	Pledges and grants receivable, net . . . . .			994,750	3	664,750
	4	Accounts receivable, net . . . . .				4	0
	5	Loans and other receivables from current and former officers, directors, trustees, key employees, and highest compensated employees Complete Part II of Schedule L . . . . .				5	0
	6	Loans and other receivables from other disqualified persons (as defined under section 4958(f)(1)), persons described in section 4958(c)(3)(B), and contributing employers and sponsoring organizations of section 501(c)(9) voluntary employees' beneficiary organizations (see instructions) Complete Part II of Schedule L				6	0
	7	Notes and loans receivable, net . . . . .				7	0
	8	Inventories for sale or use . . . . .				8	0
	9	Prepaid expenses and deferred charges . . . . .			2,181	9	2,865
	10a	Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D	10a	146,880	27,500	10c	27,500
	b	Less accumulated depreciation . . . . .	10b	119,380			
	11	Investments—publicly traded securities . . . . .			1,267,621	11	1,409,536
	12	Investments—other securities See Part IV, line 11 . . . . .				12	0
	13	Investments—program-related See Part IV, line 11 . . . . .				13	0
	14	Intangible assets . . . . .				14	0
	15	Other assets See Part IV, line 11 . . . . .				15	0
16	Total assets. Add lines 1 through 15 (must equal line 34) . . . . .			2,727,595	16	2,682,243	
Liabilities	17	Accounts payable and accrued expenses . . . . .			30,886	17	34,506
	18	Grants payable . . . . .				18	
	19	Deferred revenue . . . . .				19	
	20	Tax-exempt bond liabilities . . . . .				20	
	21	Escrow or custodial account liability Complete Part IV of Schedule D . . . . .				21	
	22	Loans and other payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons Complete Part II of Schedule L . . . . .				22	
	23	Secured mortgages and notes payable to unrelated third parties . . . . .				23	
	24	Unsecured notes and loans payable to unrelated third parties . . . . .				24	
	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 . . . . .			1,658	25	1,618
	26	Total liabilities. Add lines 17 through 25 . . . . .			32,544	26	36,124
Net Assets or Fund Balances	Organizations that follow SFAS 117 (ASC 958), check here <input checked="" type="checkbox"/> and complete lines 27 through 29, and lines 33 and 34.						
	27	Unrestricted net assets . . . . .			1,700,301	27	1,981,369
	28	Temporarily restricted net assets . . . . .			994,750	28	664,750
	29	Permanently restricted net assets . . . . .				29	
	Organizations that do not follow SFAS 117 (ASC 958), check here <input type="checkbox"/> and complete lines 30 through 34.						
	30	Capital stock or trust principal, or current funds . . . . .				30	
	31	Paid-in or capital surplus, or land, building or equipment fund . . . . .				31	
	32	Retained earnings, endowment, accumulated income, or other funds				32	
	33	Total net assets or fund balances . . . . .			2,695,051	33	2,646,119
	34	Total liabilities and net assets/fund balances . . . . .			2,727,595	34	2,682,243

Part XI Reconciliation of Net Assets

Check if Schedule O contains a response or note to any line in this Part XI

1	Total revenue (must equal Part VIII, column (A), line 12)	1	471,656
2	Total expenses (must equal Part IX, column (A), line 25)	2	627,946
3	Revenue less expenses Subtract line 2 from line 1	3	-156,290
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	4	2,695,051
5	Net unrealized gains (losses) on investments	5	120,637
6	Donated services and use of facilities	6	
7	Investment expenses	7	-13,279
8	Prior period adjustments	8	
9	Other changes in net assets or fund balances (explain in Schedule O)	9	
10	Net assets or fund balances at end of year Combine lines 3 through 9 (must equal Part X, line 33, column (B))	10	2,646,119

Part XII Financial Statements and Reporting

Check if Schedule O contains a response or note to any line in this Part XII

		Yes	No
1	Accounting method used to prepare the Form 990 <input type="checkbox"/> Cash <input checked="" type="checkbox"/> Accrual <input type="checkbox"/> 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? If "Yes," check a box below to indicate whether the financial statements for the year were compiled or reviewed on a separate basis, consolidated basis, or both <input type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis		No
2b	Were the organization's financial statements audited by an independent accountant? If "Yes," check a box below to indicate whether the financial statements for the year were audited on a separate basis, consolidated basis, or both <input checked="" type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> Both consolidated and separate basis	Yes	
2c	If "Yes," to line 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	
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
3b	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.  
▶ Information about Schedule A (Form 990 or 990-EZ) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

2014

Open to Public Inspection

Name of the organization EDISON INNOVATION FOUNDATION	Employer identification number  22-3442892
-------------------------------------------------------------	--------------------------------------------------

Part I

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

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

1

☐

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

2

☐

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

3

☐

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

4

☐

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

5

☐

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

6

☐

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

7

☒

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

8

☐

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

9

☐

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

10

☐

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

11

☐

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

a

☐

**Type I.** A supporting organization operated, supervised, or controlled by its supported organization(s), typically by giving the supported organization(s) the power to regularly appoint or elect a majority of the directors or trustees of the supporting organization **You must complete Part IV, Sections A and B.**

b

☐

**Type II.** A supporting organization supervised or controlled in connection with its supported organization(s), by having control or management of the supporting organization vested in the same persons that control or manage the supported organization(s) **You must complete Part IV, Sections A and C.**

c

☐

**Type III functionally integrated.** A supporting organization operated in connection with, and functionally integrated with, its supported organization(s) (see instructions) **You must complete Part IV, Sections A, D, and E.**

d

☐

**Type III non-functionally integrated.** A supporting organization operated in connection with its supported organization(s) that is not functionally integrated The organization generally must satisfy a distribution requirement and an attentiveness requirement (see instructions) **You must complete Part IV, Sections A and D, and Part V.**

e

☐

Check this box if the organization received a written determination from the IRS that it is a Type I, Type II, Type III functionally integrated, or Type III non-functionally integrated supporting organization

f

Enter the number of supported organizations . . . . . \_\_\_\_\_

g

Provide the following information about the supported organization(s)

(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 listed in your governing document?		(v) Amount of monetary support (see instructions)	(vi) Amount of other support (see instructions)
			Yes	No		
Total						

Part II

Support Schedule for Organizations Described in Sections 170(b)(1)(A)(iv) and 170(b)(1)(A)(vi)  
(Complete only if you checked the box on line 5, 7, or 8 of Part I or if the organization failed to qualify under Part III. If the organization fails to qualify under the tests listed below, please complete Part III.)

Section A. Public Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
1 Gifts, grants, contributions, and membership fees received (Do not include any "unusual grants.")	576,270	599,263	982,945	311,747	433,406	2,903,631
2 Tax revenues levied for the organization's benefit and either paid to or expended on its behalf						0
3 The value of services or facilities furnished by a governmental unit to the organization without charge						0
4 Total. Add lines 1 through 3	576,270	599,263	982,945	311,747	433,406	2,903,631
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)						1,885,650
6 Public support. Subtract line 5 from line 4						1,017,981

Section B. Total Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(f) Total
7 Amounts from line 4	576,270	599,263	982,945	311,747	433,406	2,903,631
8 Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources	8,917	-12,876	34,334	36,712	34,981	102,068
9 Net income from unrelated business activities, whether or not the business is regularly carried on						0
10 Other income Do not include gain or loss from the sale of capital assets (Explain in Part VI )						0
11 Total support Add lines 7 through 10						3,005,699
12 Gross receipts from related activities, etc (see instructions)					12	
13 First five years. If the Form 990 is for the organization's first, second, third, fourth, or fifth tax year as a section 501(c)(3) organization, check this box and stop here . . . . .						▶

Section C. Computation of Public Support Percentage		
14 Public support percentage for 2014 (line 6, column (f) divided by line 11, column (f))	14	33 870 %
15 Public support percentage for 2013 Schedule A, Part II, line 14	15	25 870 %
16a 33 1/3% support test—2014. 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—2013. If the organization did not check a 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—2014. 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 VI how the organization meets the "facts-and-circumstances" test The organization qualifies as a publicly supported organization	▶	
b 10%-facts-and-circumstances test—2013. 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 VI 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 IIISupport Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 9 of Part I or if the organization failed to qualify under Part II. If the organization fails to qualify under the tests listed below, please complete Part II.)

Section A. Public Support						
Calendar year (or fiscal year beginning in) ▶	(a) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(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) 2010	(b) 2011	(c) 2012	(d) 2013	(e) 2014	(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 VI.)						
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 section 501(c)(3) organization, check this box and stop here ▶						

Section C. Computation of Public Support Percentage			
15 Public support percentage for 2014 (line 8, column (f) divided by line 13, column (f))	15		
16 Public support percentage from 2013 Schedule A, Part III, line 15	16		

Section D. Computation of Investment Income Percentage			
17 Investment income percentage for 2014 (line 10c, column (f) divided by line 13, column (f))	17		
18 Investment income percentage from 2013 Schedule A, Part III, line 17	18		
19a 33 1/3% support tests—2014. 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—2013. 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 Supporting Organizations

(Complete only if you checked a box on line 11 of Part I. If you checked 11a of Part I, complete Sections A and B. If you checked 11b of Part I, complete Sections A and C. If you checked 11c of Part I, complete Sections A, D, and E. If you checked 11d of Part I, complete Sections A and D, and complete Part V.)

Section A. All Supporting Organizations

	Yes	No
1 Are all of the organization's supported organizations listed by name in the organization's governing documents? If "No," describe in <b>Part VI</b> how the supported organizations are designated. If designated by class or purpose, describe the designation. If historic and continuing relationship, explain.	1	
2 Did the organization have any supported organization that does not have an IRS determination of status under section 509(a)(1) or (2)? If "Yes," explain in <b>Part VI</b> how the organization determined that the supported organization was described in section 509(a)(1) or (2).	2	
3a Did the organization have a supported organization described in section 501(c)(4), (5), or (6)? If "Yes," answer (b) and (c) below.	3a	
b Did the organization confirm that each supported organization qualified under section 501(c)(4), (5), or (6) and satisfied the public support tests under section 509(a)(2)? If "Yes," describe in <b>Part VI</b> when and how the organization made the determination.	3b	
c Did the organization ensure that all support to such organizations was used exclusively for section 170(c)(2)(B) purposes? If "Yes," explain in <b>Part VI</b> what controls the organization put in place to ensure such use.	3c	
4a Was any supported organization not organized in the United States ("foreign supported organization")? If "Yes" and if you checked 11a or 11b in Part I, answer (b) and (c) below.	4a	
b Did the organization have ultimate control and discretion in deciding whether to make grants to the foreign supported organization? If "Yes," describe in Part VI how the organization had such control and discretion despite being controlled or supervised by or in connection with its supported organizations.	4b	
c Did the organization support any foreign supported organization that does not have an IRS determination under sections 501(c)(3) and 509(a)(1) or (2)? If "Yes," explain in Part VI what controls the organization used to ensure that all support to the foreign supported organization was used exclusively for section 170(c)(2)(B) purposes.	4c	
5a Did the organization add, substitute, or remove any supported organizations during the tax year? If "Yes," answer (b) and (c) below (if applicable). Also, provide detail in Part VI, including (i) the names and EIN numbers of the supported organizations added, substituted, or removed, (ii) the reasons for each such action, (iii) the authority under the organization's organizing document authorizing such action, and (iv) how the action was accomplished (such as by amendment to the organizing document).	5a	
b <b>Type I or Type II only.</b> Was any added or substituted supported organization part of a class already designated in the organization's organizing document?	5b	
c <b>Substitutions only.</b> Was the substitution the result of an event beyond the organization's control?	5c	
6 Did the organization provide support (whether in the form of grants or the provision of services or facilities) to anyone other than (a) its supported organizations, (b) individuals that are part of the charitable class benefited by one or more of its supported organizations, or (c) other supporting organizations that also support or benefit one or more of the filing organization's supported organizations? If "Yes," provide detail in <b>Part VI</b> .	6	
7 Did the organization provide a grant, loan, compensation, or other similar payment to a substantial contributor (defined in IRC 4958(c)(3)(C)), a family member of a substantial contributor, or a 35-percent controlled entity with regard to a substantial contributor? If "Yes," complete Part I of Schedule L (Form 990).	7	
8 Did the organization make a loan to a disqualified person (as defined in section 4958) not described in line 7? If "Yes," complete Part II of Schedule L (Form 990).	8	
9a Was the organization controlled directly or indirectly at any time during the tax year by one or more disqualified persons as defined in section 4946 (other than foundation managers and organizations described in section 509(a)(1) or (2))? If "Yes," provide detail in <b>Part VI</b> .	9a	
b Did one or more disqualified persons (as defined in line 9(a)) hold a controlling interest in any entity in which the supporting organization had an interest? If "Yes," provide detail in <b>Part VI</b> .	9b	
c Did a disqualified person (as defined in line 9(a)) have an ownership interest in, or derive any personal benefit from, assets in which the supporting organization also had an interest? If "Yes," provide detail in <b>Part VI</b> .	9c	
10a Was the organization subject to the excess business holdings rules of IRC 4943 because of IRC 4943(f) (regarding certain Type II supporting organizations, and all Type III non-functionally integrated supporting organizations)? If "Yes," answer b below.	10a	
b Did the organization have any excess business holdings in the tax year? (Use Schedule C, Form 4720, to determine whether the organization had excess business holdings).	10b	
11 Has the organization accepted a gift or contribution from any of the following persons?		
a A person who directly or indirectly controls, either alone or together with persons described in (b) and (c) below, the governing body of a supported organization?	11a	
b A family member of a person described in (a) above?	11b	
c A 35% controlled entity of a person described in (a) or (b) above? If "Yes" to a, b, or c, provide detail in Part VI.	11c	

Part IV

Supporting Organizations (continued)

Section B. Type I Supporting Organizations

	Yes	No
1 Did the directors, trustees, or membership of one or more supported organizations have the power to regularly appoint or elect at least a majority of the organization's directors or trustees at all times during the tax year? If "No," describe in <b>Part VI</b> how the supported organization(s) effectively operated, supervised, or controlled the organization's activities. If the organization had more than one supported organization, describe how the powers to appoint and/or remove directors or trustees were allocated among the supported organizations and what conditions or restrictions, if any, applied to such powers during the tax year.		
2 Did the organization operate for the benefit of any supported organization other than the supported organization(s) that operated, supervised, or controlled the supporting organization? If "Yes," explain in <b>Part VI</b> how providing such benefit carried out the purposes of the supported organization(s) that operated, supervised or controlled the supporting organization.		

Section C. Type II Supporting Organizations

	Yes	No
1 Were a majority of the organization's directors or trustees during the tax year also a majority of the directors or trustees of each of the organization's supported organization(s)? If "No," describe in <b>Part VI</b> how control or management of the supporting organization was vested in the same persons that controlled or managed the supported organization(s).		

Section D. All Type III Supporting Organizations

	Yes	No
1 Did the organization provide to each of its supported organizations, by the last day of the fifth month of the organization's tax year, (1) a written notice describing the type and amount of support provided during the prior tax year, (2) a copy of the Form 990 that was most recently filed as of the date of notification, and (3) copies of the organization's governing documents in effect on the date of notification, to the extent not previously provided?		
2 Were any of the organization's officers, directors, or trustees either (i) appointed or elected by the supported organization(s) or (ii) serving on the governing body of a supported organization? If "No," explain in <b>Part VI</b> how the organization maintained a close and continuous working relationship with the supported organization(s).		
3 By reason of the relationship described in (2), did the organization's supported organizations have a significant voice in the organization's investment policies and in directing the use of the organization's income or assets at all times during the tax year? If "Yes," describe in <b>Part VI</b> the role the organization's supported organizations played in this regard.		

Section E. Type III Functionally-Integrated Supporting Organizations

1 Check the box next to the method that the organization used to satisfy the Integral Part Test during the year (see instructions)			
a <input type="checkbox"/> The organization satisfied the Activities Test. Complete <b>line 2</b> below.			
b <input type="checkbox"/> The organization is the parent of each of its supported organizations. Complete <b>line 3</b> below.			
c <input type="checkbox"/> The organization supported a governmental entity. Describe in Part VI how you supported a government entity (see instructions).			
2 <u>Activities Test</u> <b>Answer (a) and (b) below.</b>		Yes	No
a Did substantially all of the organization's activities during the tax year directly further the exempt purposes of the supported organization(s) to which the organization was responsive? If "Yes," then in <b>Part VI identify those supported organizations and explain</b> how these activities directly furthered their exempt purposes, how the organization was responsive to those supported organizations, and how the organization determined that these activities constituted substantially all of its activities.	2a		
b Did the activities described in (a) constitute activities that, but for the organization's involvement, one or more of the organization's supported organization(s) would have been engaged in? If "Yes," explain in <b>Part VI</b> the reasons for the organization's position that its supported organization(s) would have engaged in these activities but for the organization's involvement.	2b		
3 <u>Parent of Supported Organizations</u> <b>Answer (a) and (b) below.</b>			
a Did the organization have the power to regularly appoint or elect a majority of the officers, directors, or trustees of each of the supported organizations? Provide details in Part VI.	3a		
b Did the organization exercise a substantial degree of direction over the policies, programs and activities of each of its supported organizations? If "Yes," describe in Part VI the role played by the organization in this regard.	3b		

Part V – Type III Non-Functionally Integrated 509(a)(3) Supporting Organizations

1 ☐ Check here if the organization satisfied the Integral Part Test as a qualifying trust on Nov 20, 1970 **See instructions.** All other Type III non-functionally integrated supporting organizations must complete Sections A through E

Section A - Adjusted Net Income		(A) Prior Year	(B) Current Year (optional)
1	Net short-term capital gain	1	
2	Recoveries of prior-year distributions	2	
3	Other gross income (see instructions)	3	
4	Add lines 1 through 3	4	
5	Depreciation and depletion	5	
6	Portion of operating expenses paid or incurred for production or collection of gross income or for management, conservation, or maintenance of property held for production of income (see instructions)	6	
7	Other expenses (see instructions)	7	
8	<b>Adjusted Net Income</b> (subtract lines 5, 6 and 7 from line 4)	8	

Section B - Minimum Asset Amount		(A) Prior Year	(B) Current Year (optional)
1	Aggregate fair market value of all non-exempt-use assets (see instructions for short tax year or assets held for part of year)	1	
a	Average monthly value of securities	1a	
b	Average monthly cash balances	1b	
c	Fair market value of other non-exempt-use assets	1c	
d	<b>Total</b> (add lines 1a, 1b, and 1c)	1d	
e	<b>Discount</b> claimed for blockage or other factors (explain in detail in Part VI) _____		
2	Acquisition indebtedness applicable to non-exempt use assets	2	
3	Subtract line 2 from line 1d	3	
4	Cash deemed held for exempt use Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	
5	Net value of non-exempt-use assets (subtract line 4 from line 3)	5	
6	Multiply line 5 by .035	6	
7	Recoveries of prior-year distributions	7	
8	<b>Minimum Asset Amount</b> (add line 7 to line 6)	8	

Section C - Distributable Amount			Current Year
1	Adjusted net income for prior year (from Section A, line 8, Column A)	1	
2	Enter 85% of line 1	2	
3	Minimum asset amount for prior year (from Section B, line 8, Column A)	3	
4	Enter greater of line 2 or line 3	4	
5	Income tax imposed in prior year	5	
6	<b>Distributable Amount.</b> Subtract line 5 from line 4, unless subject to emergency temporary reduction (see instructions)	6	
7	<input type="checkbox"/> Check here if the current year is the organization's first as a non-functionally-integrated Type III supporting organization (see instructions)		

Section D - Distributions	Current Year
1 Amounts paid to supported organizations to accomplish exempt purposes	
2 Amounts paid to perform activity that directly furthers exempt purposes of supported organizations, in excess of income from activity	
3 Administrative expenses paid to accomplish exempt purposes of supported organizations	
4 Amounts paid to acquire exempt-use assets	
5 Qualified set-aside amounts (prior IRS approval required)	
6 Other distributions (describe in Part VI) See instructions	
7 Total annual distributions. Add lines 1 through 6	
8 Distributions to attentive supported organizations to which the organization is responsive (provide details in Part VI) See instructions	
9 Distributable amount for 2014 from Section C, line 6	
10 Line 8 amount divided by Line 9 amount	

Section E - Distribution Allocations (see instructions)	(i) Excess Distributions	(ii) Underdistributions Pre-2014	(iii) Distributable Amount for 2014
1 Distributable amount for 2014 from Section C, line 6			
2 Underdistributions, if any, for years prior to 2014 (reasonable cause required--see instructions)			
3 Excess distributions carryover, if any, to 2014			
a From 2009. . . . .			
b From 2010. . . . .			
c From 2011. . . . .			
d From 2012. . . . .			
e From 2013. . . . .			
f Total of lines 3a through e			
g Applied to underdistributions of prior years			
h Applied to 2014 distributable amount			
i Carryover from 2009 not applied (see instructions)			
j Remainder Subtract lines 3g, 3h, and 3i from 3f			
4 Distributions for 2014 from Section D, line 7 \$			
a Applied to underdistributions of prior years			
b Applied to 2014 distributable amount			
c Remainder Subtract lines 4a and 4b from 4			
5 Remaining underdistributions for years prior to 2014, if any Subtract lines 3g and 4a from line 2 (if amount greater than zero, see instructions)			
6 Remaining underdistributions for 2014 Subtract lines 3h and 4b from line 1 (if amount greater than zero, see instructions)			
7 Excess distributions carryover to 2015. Add lines 3j and 4c			
8 Breakdown of line 7			
a From 2010. . . . .			
b From 2011. . . . .			
c From 2012. . . . .			
d From 2013. . . . .			
e From 2014. . . . .			

**Part VI** **Supplemental Information.** Provide the explanations required by Part II, line 10; Part II, line 17a or 17b; Part III, line 12; Part IV, Section A, lines 1, 2, 3b, 3c, 4b, 4c, 5a, 6, 9a, 9b, 9c, 11a, 11b, and 11c; Part IV, Section B, lines 1 and 2; Part IV, Section C, line 1; Part IV, Section D, lines 2 and 3; Part IV, Section E, lines 1c, 2a, 2b, 3a and 3b; Part V, line 1; Part V, Section B, line 1e; Part V Section D, lines 5, 6, and 8; and Part V, Section E, lines 2, 5, and 6. Also complete this part for any additional information. (See instructions).

**Facts And Circumstances Test**

Return Reference

Explanation

SCHEDULE D  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes," to Form 990,  
Part IV, line 6, 7, 8, 9, 10, 11a, 11b, 11c, 11d, 11e, 11f, 12a, or 12b.  
▶ Attach to Form 990.

Information about Schedule D (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

2014

Open to Public Inspection

Name of the organization EDISON INNOVATION FOUNDATION	Employer identification number  22-3442892
-------------------------------------------------------------	--------------------------------------------------

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

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

1

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

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

☐ Preservation of an historically important land area

☐ Protection of natural habitat

☐ Preservation of a certified historic structure

☐ Preservation of open space

2

Complete lines 2a through 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
2a	
2b	
2c	
2d	

3

Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax 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 section 170(h)(4)(B)(ii)?

☐ Yes ☐ No

9

In Part XIII, 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 (ASC 958), 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 XIII, the text of the footnote to its financial statements that describes these items

1b

If the organization elected, as permitted under SFAS 116 (ASC 958), 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) Revenue 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 (ASC 958) relating to these items

a

Revenue included in Form 990, Part VIII, line 1

▶ \$ \_\_\_\_\_

b

Assets included in Form 990, Part X

▶ \$ \_\_\_\_\_

For Paperwork Reduction Act Notice, see the Instructions for Form 990.

Cat No 52283D

Schedule D (Form 990) 2014

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

- 3

Using the organization's acquisition, 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 XIII
- 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 XIII and complete the following table
- c

Beginning balance

d

Additions during the year

e

Distributions during the year

f

Ending balance
- |    |        |
|----|--------|
|    | Amount |
| 1c |        |
| 1d |        |
| 1e |        |
| 1f |        |
- 2a

Did the organization include an amount on Form 990, Part X, line 21, for escrow or custodial account liability?

☐ Yes

☐ No
- b

If "Yes," explain the arrangement in Part XIII Check here if the explanation has been provided in Part XIII

☐

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

- |    | (a)Current year                                | (b)Prior year | b (c)Two years back | (d)Three years back | (e)Four years back |
|----|------------------------------------------------|---------------|---------------------|---------------------|--------------------|
| 1a | Beginning of year balance                      |               |                     |                     |                    |
| b  | Contributions                                  |               |                     |                     |                    |
| c  | Net investment earnings, gains, and losses     |               |                     |                     |                    |
| d  | Grants or scholarships                         |               |                     |                     |                    |
| e  | Other expenditures for facilities and programs |               |                     |                     |                    |
| f  | Administrative expenses                        |               |                     |                     |                    |
| g  | End of year balance                            |               |                     |                     |                    |
- 2

Provide the estimated percentage of the current year end balance (line 1g, column (a)) held as
- a

Board designated or quasi-endowment
- b

Permanent endowment
- c

Temporarily restricted endowment

The percentages in lines 2a, 2b, and 2c should equal 100%
- 3a

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

unrelated organizations

(ii)

related organizations
- b

If "Yes" to 3a(ii), are the related organizations listed as required on Schedule R?
- |        |     |    |
|--------|-----|----|
|        | Yes | No |
| 3a(i)  |     |    |
| 3a(ii) |     |    |
| 3b     |     |    |
- 4

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

**Part VI Land, Buildings, and Equipment.** Complete if the organization answered 'Yes' to Form 990, Part IV, line 11a. 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				
b Buildings				
c Leasehold improvements				
d Equipment				
e Other		146,880	119,380	27,500
Total. Add lines 1a through 1e (Column (d) must equal Form 990, Part X, column (B), line 10(c).)				27,500



Part XI

Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

Complete if the organization answered 'Yes' to Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements . . . . .	1	579,014
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12		
a	Net unrealized gains (losses) on investments . . . . .	2a	120,637
b	Donated services and use of facilities . . . . .	2b	
c	Recoveries of prior year grants . . . . .	2c	
d	Other (Describe in Part XIII ) . . . . .	2d	-13,279
e	Add lines 2a through 2d . . . . .	2e	107,358
3	Subtract line 2e from line 1 . . . . .	3	471,656
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 XIII ) . . . . .	4b	
c	Add lines 4a and 4b . . . . .	4c	
5	Total revenue Add lines 3 and 4c. (This must equal Form 990, Part I, line 12 ) . . . . .	5	471,656

Part XII

Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.

Complete if the organization answered 'Yes' to Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements . . . . .	1	627,946
2	Amounts included on line 1 but not on Form 990, Part IX, line 25		
a	Donated services and use of facilities . . . . .	2a	
b	Prior year adjustments . . . . .	2b	
c	Other losses . . . . .	2c	
d	Other (Describe in Part XIII ) . . . . .	2d	
e	Add lines 2a through 2d . . . . .	2e	
3	Subtract line 2e from line 1 . . . . .	3	627,946
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 XIII ) . . . . .	4b	
c	Add lines 4a and 4b . . . . .	4c	
5	Total expenses Add lines 3 and 4c. (This must equal Form 990, Part I, line 18 ) . . . . .	5	627,946

Part XIII

Supplemental Information

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, line 2, Part XI, lines 2d and 4b, and Part XII, lines 2d and 4b. Also complete this part to provide any additional information.

Return Reference	Explanation

[illegible]

Schedule I  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Name of the organization  
EDISON INNOVATION  
FOUNDATION

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.

▶ Information about Schedule I (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

2014

Open to Public  
Inspection

Employer identification number  
22-3442892

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 Domestic Organizations and Domestic Governments. Complete if the organization answered "Yes" to Form 990, Part IV, line 21, for any recipient that received more than \$5,000. Part II can be duplicated if additional space is needed.

(a) Name and address of organization or government	(b) EIN	(c) IRC 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
(1) NEW JERSEY HALL OF FAME 614 FRELINGHUYSEN AVE NEWARK, NJ 07114	22-3291935	501(C)3	12,500	0			SUPPORT MOBILE MUSEUM
(2) THOMAS EDISON NATL HISTRC PRK 211 MAIN STREET WEST ORANGE, NJ 07052	53-0197094	NATIONL PARK SERVICE	11,694	0			PURCHASE OF OFFICE EQUIPMENT

2 Enter total number of section 501(c)(3) and government organizations listed in the line 1 table . . . . . 1

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

**Part III**

**Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" to Form 990, Part IV, line 22.  
Part III can be duplicated 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
(1) TEACHERS AWARDS/STIPENDS	21	5,200			
(2) TOMMY AWARDS	6	3,000			
(3) TOMMY STATUES	6		3,780	COST	STATUES
(4) INVENTION CHALLENGE KITS	20		6,458	COST	INVENTION KITS FOR STUDENTS
(5) CAR SHOW AWARD			438	COST	TO BE AWARDED

**Part IV**

**Supplemental Information.** Provide the information required in Part I, line 2, Part III, column (b), and any other additional information.

Return Reference	Explanation
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Schedule J  
(Form 990)

Department of the Treasury  
Internal Revenue Service

Compensation Information

For certain Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees  
▶ Complete if the organization answered "Yes" to Form 990, Part IV, line 23.  
▶ Attach to Form 990.  
▶ Information about Schedule J (Form 990) and its instructions is at [www.irs.gov/form990](http://www.irs.gov/form990).

OMB No 1545-0047

2014

Open to Public Inspection

Name of the organization  
EDISON INNOVATION  
FOUNDATION

Employer identification number  
  
22-3442892

Part I

Questions Regarding Compensation

	Yes	No
<div><div>1a</div><div>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.</div><div><div><div><input checked="" type="checkbox"/> First-class or charter travel</div><div><input type="checkbox"/> Housing allowance or residence for personal use</div></div><div><div><input checked="" type="checkbox"/> Travel for companions</div><div><input type="checkbox"/> Payments for business use of personal residence</div></div><div><div><input type="checkbox"/> Tax idemnification and gross-up payments</div><div><input type="checkbox"/> Health or social club dues or initiation fees</div></div><div><div><input type="checkbox"/> Discretionary spending account</div><div><input type="checkbox"/> Personal services (e g , maid, chauffeur, chef)</div></div></div></div>		
<div><div>b</div><div>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 of the expenses described above? If "No," complete Part III to explain.</div></div>		No
<div><div>2</div><div>Did the organization require substantiation prior to reimbursing or allowing expenses incurred by all directors, trustees, officers, including the CEO/Executive Director, regarding the items checked in line 1a?</div></div>	Yes	
<div><div>3</div><div>Indicate which, if any, of the following the filing organization used to establish the compensation of the organization's CEO/Executive Director. Check all that apply. Do not check any boxes for methods used by a related organization to establish compensation of the CEO/Executive Director, but explain in Part III.</div><div><div><div><input checked="" type="checkbox"/> Compensation committee</div><div><input type="checkbox"/> Written employment contract</div></div><div><div><input type="checkbox"/> Independent compensation consultant</div><div><input checked="" type="checkbox"/> Compensation survey or study</div></div><div><div><input type="checkbox"/> Form 990 of other organizations</div><div><input checked="" type="checkbox"/> Approval by the board or compensation committee</div></div></div></div>		
<div><div>4</div><div>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:</div></div>		
<div><div>a</div><div>Receive a severance payment or change-of-control payment?</div></div>		No
<div><div>b</div><div>Participate in, or receive payment from, a supplemental nonqualified retirement plan?</div></div>		No
<div><div>c</div><div>Participate in, or receive payment from, an equity-based compensation arrangement?</div></div> <div>If "Yes" to any of lines 4a-c, list the persons and provide the applicable amounts for each item in Part III.</div>		No
<div><div></div><div>Only 501(c)(3), 501(c)(4), and 501(c)(29) organizations must complete lines 5-9.</div></div>		
<div><div>5</div><div>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:</div></div>		
<div><div>a</div><div>The organization?</div></div>		No
<div><div>b</div><div>Any related organization?</div></div> <div>If "Yes," to line 5a or 5b, describe in Part III.</div>		No
<div><div>6</div><div>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:</div></div>		
<div><div>a</div><div>The organization?</div></div>		No
<div><div>b</div><div>Any related organization?</div></div> <div>If "Yes," to line 6a or 6b, describe in Part III.</div>		No
<div><div>7</div><div>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.</div></div>		No
<div><div>8</div><div>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 Regulations section 53.4958-4(a)(3)? If "Yes," describe in Part III.</div></div>		No
<div><div>9</div><div>If "Yes" to line 8, did the organization also follow the rebuttable presumption procedure described in Regulations section 53.4958-6(c)?</div></div>		No

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

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

**Note.** The sum of columns (B)(i)-(iii) for each listed individual must equal the total amount of Form 990, Part VII, Section A, line 1a, applicable column (D) and (E) amounts for that individual.

(A) Name and Title		(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 in column(B) reported as deferred in prior Form 990
		(i) Base compensation	(ii) Bonus & incentive compensation	(iii) Other reportable compensation				
1 JOHN P KEEGAN, Chairman,Prsdnt	(i)	185,640					185,640	
	(ii)	.....	.....	.....	.....	.....	.....	.....

Part IIISupplemental Information

Provide the information, explanation, or descriptions required for Part I, lines 1a, 1b, 3, 4a, 4b, 4c, 5a, 5b, 6a, 6b, 7, and 8, and for Part II

Also complete this part for any additional information

Return Reference	Explanation
Part I, Line 1a Relevant information in regards to selections on 1a	ALL TRAVEL AND RELATED EXPENSES ARE AUTHORIZED AND APPROVED BY THE BOARD OF TRUSTEES AT MEETINGS IN ADVANCE OF TRAVEL RELATED EXPENDITURES TAKING PLACE TRAVEL EXPENSES OF THE CHAIRMAN AND PRESIDENT'S SPOUSE, ALSO ARE AUTHORIZED AND APPROVED IN ADVANCE BY THE BOARD OF TRUSTEES, ARE PAID BY THE FOUNDATION BECAUSE SHE PROVIDES VALUABLE SERVICES TO SUPPORT THE FOUNDATION'S ACTIVITIES ASSOCIATED WITH THE TRAVEL, WHICH SHE PROVIDES AS A VOLUNTEER, FOR NO COMPENSATION
Part I, Line 1b Reason for not following policy regarding payment provisions for expenses	THERE IS NOT A WRITTEN POLICY, THE FOUNDATION FOLLOWS AN INFORMAL POLICY, WHEREAS ALL TRAVEL AND RELATED EXPENSES ARE AUTHORIZED AND APPROVED BY THE BOARD OF TRUSTEES IN ADVANCE OF RELATED EXPENDITURES AS DESCRIBED IN THE RESPONSE TO LINE 1A, ABOVE

**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 990-EZ or to provide any additional information.****▶ Attach to Form 990 or 990-EZ.****▶ Information about Schedule O (Form 990 or 990-EZ) and its instructions is at  
[www.irs.gov/form990](http://www.irs.gov/form990).****2014****Open to Public  
Inspection**Name of the organization  
EDISON INNOVATION  
FOUNDATION**Employer identification number**

22-3442892

**990 Schedule O, Supplemental Information**

Return Reference	Explanation
Form 990, Part VI, Line 2 Description of Business or Family Relationship of Officers, Directors, Et	JOHN P. KEEGAN, CHAIRMAN AND PRESIDENT OF THE EDISON INNOVATION FOUNDATION IS THE FATHER OF GEORGE Q. KEEGAN, SECRETARY/TREASURER/TRUSTEE
Form 990, Part VI, Line 11b Form 990 Review Process	FORM 990 IS REVIEWED PRIOR TO ITS FILING BY JOHN P. KEEGAN, CHAIRMAN AND PRESIDENT OF THE EDISON INNOVATION FOUNDATION, AS WELL AS A TRUSTEE OF THE FOUNDATION AND THE FOUNDATIONS LEGAL COUNSEL
Form 990, Part VI, Line 12c Explanation of Monitoring and Enforcement of Conflicts	THE FOUNDATION MONITORS AND ENFORCES COMPLIANCE WITH THE CONFLICT OF INTEREST POLICY SEMI-ANNUALLY AT BOARD MEETINGS
Form 990, Part VI, Line 15b Compensation Review and Approval Process for Officers and Key Employees	THERE IS AN ANNUAL REVIEW OF COMPENSATION BY THE COMPENSATION COMMITTEE OF THE BOARD OF TRUSTEES, THROUGH WHICH THE COMMITTEE REVIEWS COMPENSATION DATA AND STATISTICS REGARDING COMPARABLE ORGANIZATIONS FROM THE COUNCIL ON FOUNDATIONS AND ASSOCIATION OF SMALL FOUNDATIONS FOR GUIDANCE, AND THEN MAKES ITS RECOMMENDATIONS TO THE BOARD REGARDING THE APPROPRIATE AMOUNT OF COMPENSATION FOR THE BOARD'S APPROVAL
Form 990, Part VI, Line 19 Other Organization Documents Publicly Available	THE FOUNDATION DOES NOT DISCLOSE ITS GOVERNING DOCUMENTS, CONFLICT OF INTEREST POLICY OR ITS FINANCIAL STATEMENTS TO THE GENERAL PUBLIC
PLEASE SEE CONTINUATION OF SCHEDULE O FOR OTHER ITEMS	ITEMS FOR PART IX AND X INCLUDED ON CONTINUATION OF SCHEDULE O

**FORM 990, PART III, LINE 4A PROGRAM SERVICE ACCOMPLISHMENTS****NATIONAL GALLERY OF YOUNG INVENTORS (CONTINUED FROM FORM 990)**

This year's recipients have been chosen, once again, by a panel of previous winners of this prestigious award by demonstrating their excellence in the field of invention and innovation. This year's winners are between 14 and 18 years old. This inductees and their projects are:

- I. Joshua Abreo. A novel antimicrobial polymer coating for biomedical applications.
- II. Raghav Ganesh. A Cane that can See: A low cost, adoptable, user-tested, add-on device for the white cane that facilitates safer mobility for the visually challenged.
- III. Aditya Jain. It's Matter of Life & Breath: An improved automated tool for lung cancer pulmonary nodule detection.
- IV. Loren Newton. A novel approach to "capture" wingtip vortices.
- V. Maya Varma: Arduino-based foot neuropathy analyzer.
- VI. Steven Wang and Andrew Jin (Team). Novel computational framework for the discovery of synergistic chemotherapy combinations.

**FORM 990, PART III, LINE 4B – PROGRAM SERVICE ACCOMPLISHMENTS**

The campaign to advance Thomas Edison's legacy being conducted by EIF raised the needed funds to restore and enhance the invention factory and Glenmont at the TENHP, Edison's Home, and to sustain this and other significant Edison locations in the future, including the site of Edison's first research and development lab in Menlo Park, New Jersey; Seminole Lodge in Fort Myers, Florida, Edison winter home; the Edison Birthplace Museum in Milan, Ohio; his early-years home in Port Huron, Michigan; The Edison Plaza Museum in Beaumont, Texas; and the Henry Ford Museum & Greenfield Village in Dearborn, Michigan. Finally, it will perpetuate his legacy through educational programs and outreach tailored to inspire our youth, especially, young women and minorities, to pursue careers in science.

Specific items at the TENHP that were supported by funds raised include the construction of a new educational resource center and administrative building; the restoration of existing historic buildings, including Glenmont; development of an expanded parking area and other site work; investments in furniture and other equipment for administrative and staff offices, classrooms and multi-purpose rooms, including audio visual equipment for auditoriums, climate –controlled

racks for curatorial storage, etc; and the creation of exhibits highlighting specific inventions.

The original laboratory buildings, millions of archival items, hundreds of thousands of artifacts and Glenmont offer limitless opportunities to showcase Edison's life through a range of interpretive techniques. A variety of guided tours, self-guided tours, two-dimensional and three-dimensional exhibits, audio-visual programs, computer-delivered learning, interactive exhibits, demonstrations and hands-on learning opportunities make Edison come alive.

The TENHP today maintains a compelling sense of history, a feeling that Edison has just stepped away from the laboratory, this sense of history will be maintained and balanced with the development of new exhibits and updates to existing interpretation strategies.

As envisioned, the TENHP exhibit plan, through state-of-the-art electronic and interactive technologies, now enhances the experience of exploring the TENHP in an integrated way that seamlessly connects and infuses key themes into the exhibits, visitor orientation, and all other interpretive opportunities, including on-site and "virtual" programming. The challenge was to effectively integrate new interpretive facilities in a historic landmark setting that can tell a story of extraordinary narrative scope. Special targeted interpretive areas are especially essential for children who will most likely not have heard of Edison, nor be aware that his inventions have created or shaped many items they use everyday.

The design team responsible for the plan to restore and preserve TENHP included architects, engineers, landscape architects, interpretive designers, exhibit designers, museum specialists, materials conservators and marketing specialists. The renowned exhibit planning and design team of Ralph Appelbaum Associates ("RAA") was retained to develop the exhibit concept plan. RAA is best known for large scale permanent museum projects that interweave complex educational content with noteworthy and/or historic physical environments. Among other large scale projects, RAA's recent commissions include projects for the U.S. Holocaust Memorial Museum in Washington, DC; the American Museum of Natural History in New York City and the Museum of African American History in Detroit, Michigan.

## **CONSTRUCTION**

The restored TENHP is a vibrant mixture of the new and the old, historic buildings were preserved, Edison's library and other key spaces of the laboratory buildings, for instant remain significantly the same, conveying the feeling that the inventor himself just left the room. Walking through the real place where real people achieved great things, visitors experience the life, work and genius of Thomas Edison.

New structures provide much needed additional space. As presently envisioned, new spaces were constructed at TENHP to include visitor services and administrative office space. Visitor services include a theater/lecture hall, and information center, a gift shop, restrooms and a central gathering place as well as both permanent and adaptive exhibits. Classrooms and multi-purpose space for museum services, interpretive staff and exhibition space for the archival collections are also featured. Finally, space provided for curatorial staff and for groups affiliated with the TENHP such as the Friends of Edison and the Edison Innovation Foundation.

The TENHP has become a "Time Magazine" that allows visitors to access the past, present and future through historic spaces, programs and exhibits and new facilities. The more than 400,000 objects and five million pages of paper in Edison's collection are accessible through live exhibits as well as through "virtual" exhibits using computers and other technologies. Glenmont offers more programs and allows visitors to focus on his more private, personal life.

New technologies enhance the visitor experience including audio-visual devices, holograms, touch-screen computers, etc. As often as possible, technologies directly derived from Edison's inventions are used to connect the old with the new and allow visitors to grasp the enormous impact of Edison's work.

With these additions and enhancements, and through programs and services delivered via the internet and other communications technologies, the TENHP has a broad, worldwide impact. The restored and rehabilitated TENHP engages an international audience of school children, families, scholars and individuals.

### **EDUCATIONAL PROGRAMS AND OUTREACH**

Edison's invention factory is an invaluable educational tool. It is a place where history, science and technology and the inspiration of Edison's life leap out of textbooks and become alive. The TENHP today offers two interdisciplinary, curriculum-based programs "idea to product the Edison way," tailored for grades four through seven and "technology and the impact of Edison," for high school students, each of these programs includes a pre-visit activity packet organized according to New Jersey curriculum standards and on-site ranger led programming. Nearly 10,000 school children take part in these programs annually and demand far outweighs supply.

The restoration funded through EIF's efforts provides an important opportunity to greatly strengthen existing curriculum-based educational programming. Among other enhancements, interactive exhibits will be created that will not only highlight Edison's contributions to our world but also give students the opportunity to apply lessons learned hands-on to tinker, to test, to be creative.

The interactive displays give students a chance to touch, manipulate and generate responses from exhibits, transforming the traditional museum experience into a genuine informal learning opportunity, multi-disciplinary activities - inspiring creativity, perseverance, original thinking, problem solving and teamwork – will be adaptable and integrated to enhance existing curriculum-based educational materials and ranger-led programs.

Educational programming has incorporated individual and group interactivity into a narrative contextual environment that will not only systematically tell the story of Thomas Edison but also create multi-sensory, memorable events for students and visitors alike. The interactive exhibits – by demonstrating a principle, developing a skill, allowing a student to play a role – offer alternative entry points to this amazing story.

Computer and multi-media programming serve as the nexus for off-site learning and “virtual classrooms” facilitating long-distance learning programming, for instance, the TENHP today maintains a web site, an important but, in its present form, limited educational resource. This presence is greatly augmented, through audio, video as well as textual programming.

Creating or augmenting multi-media and computer-based programming also allows for the establishment of meaningful connections and links between the TENHP, other Edison sites across the country and other science centers (such as the Smithsonian Institution in Washington, DC, and the Edison exhibition at the Massachusetts Institute of Technology) through the internet, satellite or other emergent technology, currently, TENHP directly serves the most densely populated areas of the country. Public, private and parochial schools from throughout New Jersey, New York City and Eastern Pennsylvania take part in the TENHP's educational programming. Indirectly, through off-site programming and through its internet presence, TENHP reaches many more thousands of students. The planned restoration and enhancement of educational services will allow the TENHP to reach a much larger and more diverse audience.

The restoration and enhancement process also offered an important opportunity to deeply involve a group of students and educators in the conception, design and fabrication of interactive exhibits, during the planning and design phase. educators were consulted to develop lists of topics and real life curriculum elements around which the exhibits will revolve. Students were consulted to provided feedback and advice of educational programming, as well. As to determine current student pools of knowledge on topics selected, student preconceptions and interests of particular importance here, was ensuring entry points in the exhibits and educational materials for young women and minority students. The participation of female and minority students in the planning and design phase was thus critical to success.

Every effort was made to include students and educators from minority and low income school districts in this process. This encouraged local communities, particularly minority communities, to partner with the TENHP seeing their input into the development of his important resource translated into reality, once the restoration was complete, TENHP staff built on these efforts and maintains outreach to inner-city or largely minority schools and thus increase minority student participation in TENHP's educational offerings and programs.

**THE ORGANIZATION STRUCTURE OF EIF IS AS FOLLOWS:**

Edison Innovation Foundation

1 Riverfront Plaza, Suite 340  
Newark, New Jersey 07102

**OFFICERS**

Chairman and President  
Executive Vice President  
Vice President  
Secretary/Treasurer

John P. Keegan  
Thomas J. Ungerland  
Wade Knowles  
George Q. Keegan

**TRUSTEES**

James E. Howe  
George Q. Keegan  
John P. Keegan  
Wade Knowles  
Thomas J. Ungerland

**COMMITTEES**

Audit  
Compensation  
Executive  
Investment

**PROJECTS IN 2014**

EIF has continued to expand its programs during 2014. Throughout the year, EIF has worked to create stronger relationships with various organizations in order to further its mission of inspiring youth and minorities to follow careers in science and technology.

**1. Thomas Edison National Historical Park (“TENHP”)**

Since the grand opening in 2009, EIF along with TENHP have continued to prove a more holistic visitor’s experience. A list of the renovations includes but not limited to:

**I. Glenmont Garage:**

EIF is currently working with TENHP to fundraise for those renovations. The structure itself will be renovated to its original condition, as per the curatorial standards of the National Park Service. Most of this will involve the first floor of this working garage, built in 1908. The first floor of the structure can hold six vehicles. The second floor of the building once housed the live-in chauffeur and his family. The vehicles existing now and the charging station will be fully restored. The restoration of the Ford Model and Locomobile has been completed. The 1936 Brewster is being restored and expected to be completed late spring of 2015. The second floor will be renovated into a hands-on classroom, labs and lecture areas for special educational programs and site meeting space. The cost of the project will be \$3.7 million. .

**2. New Jersey Hall of Fame**

EIF approved a grant in the amount of \$12,500 to help underwrite the New Jersey Hall of Fame Mobile Museum’s expenses. As you know, Thomas Alva Edison was the first inductee into this organization. Attached to the tractor is a generator along with a 48’ trailer which houses exhibits and artifacts from various inductees including Thomas Edison. The Mobile Museum not only will provide an efficient way to introduce the inductees to students, but will enhance community participation.

**3. Social Media and Edison Branding**

EIF has begun to preserve and, importantly, enhance the “Edison Legacy” through the development of a communications program for EIF as follows:

- I. EIF maintains an active internet and social media presence. Every ten days a science and technology Blob ([www.edisonmuckers.org](http://www.edisonmuckers.org)), is posted commenting on current science or technology developments, often with a connection to the legacy of Thomas Alva Edison. EIF has a newly designed active website ([www.thomasedison.org](http://www.thomasedison.org)). EIF has an active Facebook, Twitter, Pinterest and YouTube outlets. EIF's blog and website have a combined annual visitorship in excess of 350,000 as well as postings on Facebook (over 100,000 "Likes"). EIF sent out e-blasts (over 90,000) to many teachers and students that populate EIF's visitor list with a goal of showing how Edison is still relevant today.
- II. Revitalize the Edison name by elevating it beyond "the man" and making it synonymous with ideas and the power of invention and thus build a vibrant value.
- III. Make the Edison brand a more viable commercial property thereby generating these funds to support EIF programs and initiatives.

#### 4. Alternative Energy Program

In 2014, EIF continued its commitment for an alternative energy program by sponsoring the Alternative Energy Technology Competition. Thomas Alva Edison did early experiments in alternative energy including the storage battery and coal conversion, which encouraged EIF to sponsor the Alternative Energy Program described below. A multi-part program is being developed by EIF which initially will educate, and ultimately challenge, student and teachers to learn about, and experiment with, alternative energy sources. EIF and its' sister organization, the Charles Edison Fund ("CEF") have a history of encouraging alternative energy experiments. The program is designed to engage the highest achieving science students (with emphasis on women and minorities) from high schools nationwide to participate in a multi-part alternative energy program. Since the Competition now is mainly on-line, teams from all states will be able to compete. The 2014 winners were:

- I. First Place: Northern Highlands Regional High School "Solar Survival Kit".
- II. Second Place: High Point Regional High School "Eye in the Sky".
- III. Third Place: Walldwick High School "Solar Cooler".

**5. Edison Concours d'Elegance**

The Edison Concours d'Elegance Foundation, LLC, the Edison Innovation Foundation and National Park Service are working closely to create a world-class series of events to be held on the grounds of Thomas Edison's home Glenmont, Llewellyn Park, West Orange, New Jersey. This event will benefit EIF and bring awareness to the restoration project of Thomas Edison's Garage and to preserve the Legacy of Thomas Edison.

**6. Edison Innovation Foundation Advisory Board**

Recently, EIF established an advisory board to assist it with respect to (i) fundraising and (ii) support for its ongoing programs.

**FORM 990, PART IV, QUESTION 34**

On February 11, 1997, EIF executed a significant agreement with the United States National Park Service ("NPS") in which both parties agreed to cooperate in a major renovation and fundraising effort to support the Thomas Alva Edison National Historical Park ("TENHP") and home of Thomas Alva Edison located in West Orange, New Jersey. The agreement has a 25-year life and expires in 2022 unless extended. Since TENHP is owned by NPS, it had some very specific conditions that had to be fulfilled. NPS insisted that a totally independent section 501(c)3 Public Charity be created by the entity on the fundraising side of the ultimate agreement since the NPS is not permitted by United States Law to engage in fundraising. NPS also wanted to be certain that any funds raised would be segregated from any funds from any other foundation or entity. Further, both NPS and EIF needed to be sure that any donations by contributors would be subject to the least restrictive income tax deduction rules and not restricted by the rules which limit deductions to "private foundations". It also should be noted that most donors will not contribute to any entity that is a "private foundation".



UBS Financial Services Inc  
2310 Route 34  
2nd Floor, Suite 2a  
Manasquan NJ 08736-1400

APZ6000846825 1214 X13 SU 0

# 2014 Year End Summary

**Account name:** EDISON INNOVATION FOUNDATION  
**Account number:** SU 06811 BC

**Your Financial Advisor:**  
KEEGAN AND FONTANA  
Phone 732-223-5910/888-413-7785

EDISON INNOVATION FOUNDATION  
1037 RAYMOND BLVD.  
STE 340  
NEWARK NJ 07102-5425

## Summary of gains and losses

	Amount (\$)
Short term	883.75
Long term	908.75
<b>Total</b>	<b>\$1,792.50</b>

## Realized gains and losses

Estimated 2014 gains and losses for transactions with trade dates through 12/31/14 have been incorporated into this statement. Please note that gain or loss recognized on the sale or redemption of certain Structured Products, like Contingent Debt Securities, may be ordinary, and not capital, gain or loss. Please check with your tax advisor. To calculate gains and losses, we liquidate the oldest security lot first. This is known as the first-in, first-out or FIFO accounting method. We use this method unless you specified which tax lot to close when you placed your order. This is known as a versus purchases or VSP order.

## Short-term capital gains and losses

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
AT&T INC	FIFO	71.000	Sep 06, 13	Feb 05, 14	2,285.07	2,368.26		-83.19	

continued next page

See Important information about your statement on the last page of this statement for more information. We may not adjust gains and losses for all capital changes. Cost basis for coupon tax-exempt municipal securities, includes securities subject to AMT, has been adjusted for mandatory amortization of bond premium. Estimates in the Unclassified section can not be classified as short-term or long-term because information is missing, or the product is one in which the gain/loss calculation is not provided.



ACCESS

Account name:  
EDISON INNOVATION FOUNDATION  
Account number:  
SU 06311 BCYour Financial Advisor:  
KEEGAN AND FONTANA  
732-223-5910/888-413-7785

## Realized gains and losses (continued)

## Short-term capital gains and losses (continued)

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
BHP BILLITON LTD SPON ADR	FIFO	8 000	Sep 06, 13	Jan 16, 14	533 74	523 29			10 45
	FIFO	8 000	Sep 06, 13	Aug 27, 14	556 94	523 28			33 66
COCA COLA CO COM	FIFO	20 000	Sep 06, 13	Mar 18, 14	768 06	769 20		-1 14	
	FIFO	15 000	Sep 06, 13	Aug 22, 14	619 44	576 89			42 55
DEERE AND CO	FIFO	38 000	Sep 06, 13	Jan 31, 14	3,289 64	3,144 03			145 61
DIAGEO PLC NEW GB SPON ADR	FIFO	8 000	Sep 06, 13	Aug 25, 14	949 77	993 76		-43 99	
	FIFO	5 000	Sep 06, 13	Aug 26, 14	594 57	621 10		-26 53	
ENBRIDGE INC CAD	FIFO	8 000	Sep 06, 13	Aug 29, 14	398 66	331 49			67 17
	FIFO	10 000	Sep 06, 13	Sep 02, 14	497 90	414 37			83 53
	FIFO	7 000	Sep 06, 13	Sep 03, 14	353 77	290 05			63 72
GENL MILLS INC	FIFO	10 000	Sep 06, 13	Aug 22, 14	529 13	492 50			36 63
KINDER MORGAN INC	FIFO	34 000	Sep 06, 13	May 01, 14	1,106 59	1,216 72		-110 13	
	FIFO	4 000	Sep 06, 13	May 02, 14	131 43	143 14		-11 71	
LORILLARD INC	FIFO	52 000	Sep 06, 13	Jan 02, 14	2,604 79	2,289 28			315 51
NEWMONT MINING CORP (HOLDING CO)	FIFO	31 000	Sep 06, 13	Jan 15, 14	733 38	946 74		-213 36	
PHILIP MORRIS INTL INC	FIFO	23 000	Sep 06, 13	Jan 02, 14	1,980 38	1,937 67			42 71
	FIFO	7 000	Sep 06, 13	Aug 22, 14	591 25	589 73			1 52
PRUDENTIAL FINANCIAL INC	FIFO	7 000	Sep 06, 13	Aug 27, 14	631 85	544 16			87 69
PUBLIC SERVICE ENTERPRSE GROUP INC	FIFO	38 000	Sep 06, 13	Jan 02, 14	1,195 70	1,234 07		-38 37	
TRAVELERS COS INC/THE	FIFO	18 000	Oct 24, 13	Oct 02, 14	1,676 87	1 568 67			108 20
UNILEVER NV NY SHS NEW NETHERLANDS SPON ADR	FIFO	31 000	Sep 05, 13	Jan 14, 14	1,208 44	1,168 60			39 84
VERITIV CORP COM	Adjustment	0 611	Sep 06, 13	Jul 02, 14	22 17	21 65			0 52
VF CORP	FIFO	13 000	Sep 06, 13	Aug 18, 14	809 74	623 77			185 97
	FIFO	10 000	Sep 06, 13	Aug 19, 14	626 72	479 83			146 89
<b>Total</b>					<b>\$24,696.00</b>	<b>\$23,812.25</b>		<b>-\$528.42</b>	<b>\$1,412.17</b>
<b>Net short-term capital gains and losses</b>									<b>\$883.75</b>

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Account name:  
Account number:EDISON INNOVATION FOUNDATION  
SU 06811 BCYour Financial Advisor:  
KEEGAN AND FONTANA  
732-223-5910/888-413-7785

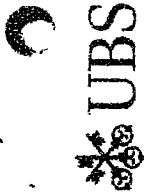
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## Realized gains and losses (continued)

## Long-term capital gains and losses

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
CALIFORNIA RESOURCES CORP	FIFO	0.800	Sep 06, 13	Dec 01, 14	5.19	6.21		-1.02	
DOMINION RESOURCES INC VA (NEW)	FIFO	7.000	Sep 06, 13	Oct 08, 14	496.59	404.71			91.88
ENBRIDGE INC CAD	FIFO	13.000	Sep 06, 13	Oct 09, 14	595.14	538.68			56.46
	FIFO	15.000	Sep 06, 13	Oct 10, 14	668.96	621.54			47.42
	FIFO	7.000	Sep 06, 13	Oct 13, 14	311.80	290.06			21.74
INTL BUSINESS MACH	FIFO	4.000	Sep 06, 13	Oct 23, 14	650.15	733.04		-82.89	
KIMBERLY CLARK CORP	FIFO	4.000	Sep 06, 13	Sep 09, 14	427.78	372.80			54.98
	FIFO	14.000	Sep 06, 13	Sep 10, 14	1,494.34	1,304.80			189.54
	FIFO	3.000	Sep 06, 13	Sep 11, 14	319.85	279.60			40.25
MEADWESTVACO CORP	FIFO	4.000	Sep 06, 13	Sep 12, 14	169.86	148.39			21.47
	FIFO	8.000	Sep 06, 13	Sep 15, 14	338.93	296.77			42.16
	FIFO	10.000	Sep 05, 13	Sep 16, 14	422.77	370.97			51.80
	FIFO	8.000	Sep 06, 13	Sep 17, 14	337.12	296.77			40.35
	FIFO	9.000	Sep 06, 13	Sep 18, 14	380.10	333.87			46.23
	FIFO	9.000	Sep 06, 13	Sep 19, 14	381.89	333.88			48.01
	FIFO	5.000	Sep 06, 13	Sep 22, 14	209.60	185.48			24.12
NEXTERA ENERGY INC COM	FIFO	5.000	Sep 06, 13	Oct 08, 14	470.65	400.68			69.97
UNILEVER NV NY SHS NEW	FIFO	15.000	Sep 06, 13	Nov 11, 14	585.35	565.45			19.90
NETHERLANDS SPON ADR	FIFO	16.000	Sep 06, 13	Oct 08, 14	1,621.17	1,657.53		-36.36	
UNTD TECHNOLOGIES CORP	FIFO	7.000	Sep 06, 13	Oct 08, 14	544.59	511.00			33.59
WAL MART STORES INC	FIFO	29.000	Sep 06, 13	Sep 15, 14	954.66	825.51			129.15
WEYERHAEUSER CO	FIFO				\$11,386.49	\$10,477.74		-\$120.27	\$1,029.02
Total									\$908.75
Net long-term capital gains or losses									\$1,792.50
Net capital gains/losses:									





UBS Financial Services Inc.  
2310 Route 34  
2nd Floor, Suite 2a  
Manasquan NJ 08736-1400

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# 2014 Year End Summary

Account name: EDISON INNOVATION FOUNDATION  
Account number: SU 06812 BC

Your Financial Advisor:  
KEEGAN AND FONTANA  
Phone: 732-223-5910/888-413-7785

EDISON INNOVATION FOUNDATION  
1037 RAYMOND BLVD  
STE 340  
NEWARK NJ 07102-5425

## Summary of gains and losses

	Amount (\$)
Short term	3,557 58
Long term	-3,594 24
<b>Total</b>	<b>\$-36.66</b>

## Realized gains and losses

Estimated 2014 gains and losses for transactions with trade dates through 12/31/14 have been incorporated into this statement. Please note that gain or loss recognized on the sale or redemption of certain Structured Products, like Contingent Debt Securities, may be ordinary, and not capital, gain or loss. Please check with your tax advisor. To calculate gains and losses, we liquidate the oldest security lot first. This is known as the first-in, first-out or FIFO accounting method. We use this method unless you specified which tax lot to close when you placed your order. This is known as a versus purchases or VSP order.

## Short-term capital gains and losses

Security description	Method	Quantity or face value	Purchase date	Sale date	Wash sale cost basis adjustment (\$)	Cost basis (\$)	Loss (\$)	Gain (\$)
ABBVIE INC COM	FIFO	1,000	Sep 06, 13	Feb 13, 14		50 32	43 75	6 57

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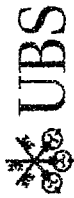
See important information about your statement on the last page of this statement for more information. We may not adjust gains and losses for all capital changes. Cost basis for coupon tax-exempt municipal securities, include securities subject to AMT, has been adjusted for mandatory amortization of bond premium. Estimates in the Unclassified section can not be classified as short term or long term because information is missing, or the product is one in which the gain/loss calculation is not provided.



Member SIPC

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Account name: EDISON INNOVATION FOUNDATION  
Account number: SU 06812 BCYour Financial Advisor:  
KEEGAN AND FONTANA  
732-223-5910/888-413-7785

## Realized gains and losses (continued)

## Short-term capital gains and losses (continued)

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
ACCENTURE PLC IRELAND CL A	FIFO	1 000	Sep 06, 13	Feb 13, 14	81.66	73.88			7.78
ACE LTD CHF	FIFO	1 000	Sep 06, 13	Feb 13, 14	96.08	88.69			7.39
	FIFO	7 000	Sep 06, 13	Jun 27, 14	724.00	620.83			103.17
BLACKROCK INC	FIFO	1 000	Sep 06, 13	Feb 13, 14	304.35	262.02			42.33
COCA COLA CO COM	FIFO	2 000	Sep 06, 13	Feb 13, 14	77.34	77.01			0.33
	FIFO	140 000	Sep 06, 13	Jul 24, 14	5,741.45	5,390.70			350.75
CULLEN FROST BANKERS INC	FIFO	1 000	Sep 06, 13	Feb 13, 14	74.25	70.08			4.17
CVS HEALTH CORP	FIFO	12 000	Sep 06, 13	Jan 03, 14	843.87	706.62			137.25
EATON CORP PLC	FIFO	59 000	Sep 06, 13	Feb 07, 14	4,159.37	3,884.87			274.50
JPMORGAN CHASE & CO	FIFO	1 000	Sep 06, 13	Feb 13, 14	58.02	52.13			5.89
KINDER MORGAN INC	Adjustment	2 000	Sep 06, 13	Feb 13, 14	67.23	67.23	-4.49		99.69
	FIFO	24 000	Sep 06, 13	Aug 29, 14	960.32	860.63			0.55
LOWES COMPANIES INC	FIFO	1 000	Sep 06, 13	Feb 13, 14	46.60	46.05			19.14
MICROSOFT CORP	FIFO	3 000	Sep 06, 13	Feb 13, 14	112.97	93.83			19.14
MOTOROLA SOLUTIONS INC	FIFO	72 000	Sep 06, 13	Aug 29, 14	4,270.33	4,075.19			195.14
NEXTERA ENERGY INC COM	FIFO	1 000	Sep 06, 13	Feb 13, 14	92.76	80.21			12.55
NOVO NORDISK ADR DENMARK ADR	FIFO	28 000	Sep 06, 13	Mar 13, 14	1,283.84	908.26			375.58
ONE GAS INC	FIFO	0 500	Sep 06, 13	Feb 03, 14	16.78	13.03			3.75
	FIFO	18 000	Sep 06, 13	Feb 07, 14	595.12	469.10			126.02
ONEOK INC NEW	FIFO	74 000	Sep 06, 13	Mar 27, 14	4,308.10	3,321.46			986.64
Pfizer INC	FIFO	4 000	Sep 06, 13	Feb 13, 14	126.79	113.59			13.20
PHILIP MORRIS INTL INC	FIFO	1 000	Sep 06, 13	Feb 13, 14	79.20	84.41		-5.21	
PHILIPS 66	FIFO	1 000	Sep 06, 13	Feb 13, 14	74.61	58.00			16.61
QUALCOMM INC	FIFO	1 000	Sep 06, 13	Feb 13, 14	76.46	68.20			8.26
	FIFO	13 000	Sep 06, 13	Feb 24, 14	985.45	885.54			98.91
SEADRILL LTD US LINE	FIFO	2 000	Sep 06, 13	Feb 13, 14	71.63	92.07		-20.44	
SOUTHERN COPPER CORP	FIFO	4 000	Sep 06, 13	Feb 13, 14	126.40	111.39			15.01
	FIFO	142 000	Sep 06, 13	May 23, 14	4,334.49	3,954.42			380.07

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Account name:  
Account number:

EDISON INNOVATION FOUNDATION  
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KEEGAN AND FONTANA  
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## Realized gains and losses (continued)

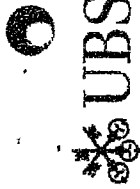
### Short-term capital gains and losses (continued)

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
UNION PACIFIC CORP	FIFO	4,000	Sep 06, 13	Feb 24, 14	722.68	628.92			93.76
	FIFO	7,000	Sep 06, 13	Apr 09, 14	1,298.83	1,100.61			198.22
<b>Total</b>					<b>\$31,861.30</b>	<b>\$28,303.72</b>		<b>-\$25.65</b>	<b>\$3,583.23</b>
<b>Net short-term capital gains and losses</b>									<b>\$3,557.58</b>

### Long-term capital gains and losses

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
BANK OF NEW YORK MELLON CORP	FIFO	38,000	Sep 06, 13	Sep 22, 14	1,501.72	1,160.74			340.98
	FIFO	62,000	Sep 06, 13	Dec 23, 14	2,566.22	1,893.84			672.38
KINDER MORGAN INC	FIFO	27,000	Sep 06, 13	Nov 21, 14	1,082.06	968.21			113.85
SEADRILL LTD US LINE	FIFO	136,000	Sep 06, 13	Dec 16, 14	1,539.52	6,260.97		-4,721.45	
<b>Total</b>					<b>\$5,689.52</b>	<b>\$10,283.76</b>		<b>-\$4,721.45</b>	<b>\$1,127.21</b>
<b>Net long-term capital gains or losses</b>									<b>-\$3,594.24</b>
<b>Net capital gains/losses:</b>									<b>-\$36.66</b>





UBS Financial Services Inc.  
2310 Route 34  
2nd Floor, Suite 2a  
Manasquan NJ 08736-1400  
CPZ6001495739 1214 X13 SU 0

# 2014 Year End Summary

Account name: EDISON INNOVATION FOUNDATION  
Account number: SU 06813 BC

Your Financial Advisor:  
KEEGAN AND FONTANA  
Phone: 732-223-5910/888-413-7785

EDISON INNOVATION FOUNDATION  
1037 RAYMOND BLVD  
STE 340  
NEWARK NJ 07102-5425

## Summary of gains and losses

	Amount (\$)
Short term	1,132.73
Long term	380.40
<b>Total</b>	<b>\$1,513.13</b>

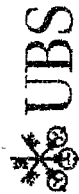
## Realized gains and losses

Estimated 2014 gains and losses for transactions with trade dates through 12/31/14 have been incorporated into this statement. Please note that gain or loss recognized on the sale or redemption of certain Structured Products, like Contingent Debt Securities, may be ordinary, and not capital, gain or loss. Please check with your tax advisor. To calculate gains and losses, we liquidate the oldest security lot first. This is known as the first-in, first-out or FIFO accounting method. We use this method unless you specified which tax lot to close when you placed your order. This is known as a versus purchases or VSP order.

## Short-term capital gains and losses

Security description	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
AMER ELECTRIC POWER CO	47,000	Sep 06, 13	Mar 11, 14	2,291.54	2,010.56			280.88
								<i>continued next page</i>

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Account name: EDISON INNOVATION FOUNDATION  
Account number: SU 06813 BCYour Financial Advisor:  
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732-223-5910/888-413-7785

## Realized gains and losses (continued)

## Short-term capital gains and losses (continued)

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
AT&T INC	FIFO	56 000	Sep 06, 13	May 20, 14	2,005.20	1,870.16			135.04
CALIFORNIA RESOURCES CORP	FIFO	2.800	Mar 20, 14	Dec 17, 14	16.20	22.64		-6.44	
CATERPILLAR INC	FIFO	23.000	Sep 06, 13	Apr 03, 14	2,351.16	1,928.40			422.76
DU PONT DE NEMOURS	FIFO	32 000	Sep 06, 13	Jun 27, 14	2,088.29	1,829.30			258.99
INTL PAPER CO	FIFO	11 000	Sep 06, 13	Jul 25, 14	550.72	520.39			30.33
	FIFO	6 000	Sep 06, 13	Jul 28, 14	299.99	283.84			16.15
	FIFO	2 000	Sep 06, 13	Jul 29, 14	99.99	94.62			5.37
PRIZER INC	FIFO	141 000	Sep 06, 13	Jul 30, 14	4,118.91	4 006.63			112.28
	FIFO	17 000	Sep 10, 13	Jul 30, 14	496.61	483.61			13.00
TARGET CORP	FIFO	28 000	Sep 06, 13	Feb 26, 14	1,694.38	1,780.71		-86.33	
	FIFO	35 000	Sep 06, 13	May 05, 14	2,129.09	2,225.89		-96.80	
TIME INC NEW COM	FIFO	0.875	Sep 06, 13	Jun 09, 14	19.84	17.54			2.30
	FIFO	7 250	Sep 06, 13	Jul 15, 14	181.74	145.30			36.44
	FIFO	0 250	Oct 11, 13	Jul 15, 14	6.27	5.47			0.80
	FIFO	1.500	Jan 07, 14	Jul 15, 14	37.60	32.97			4.63
VERITIV CORP COM	Adjustment	0.605	Sep 06, 13	Jul 02, 14	21.96	21.52			0.44
	Adjustment	1 000	Sep 06, 13	Jul 15, 14	38.41	35.52			2.89
<b>Total</b>					<b>\$18,447.90</b>	<b>\$17,315.17</b>		<b>-\$189.57</b>	<b>\$1,322.30</b>
Net short-term capital gains and losses									<b>\$1,132.73</b>

## Long-term capital gains and losses

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
AT&T INC	FIFO	94 000	Sep 06, 13	Dec 09, 14	3,084.65	3,139.21		-54.56	
CALIFORNIA RESOURCES CORP	FIFO	0 600	Sep 06, 13	Dec 01, 14	3.90	4.66		-0.76	
	FIFO	8 200	Sep 06, 13	Dec 17, 14	47.44	63.71		-16.27	
CDK GLOBAL INC COM	Adjustment	0 333	Sep 06, 13	Oct 01, 14	10.20	9.22			0.98
	Adjustment	18 090	Sep 06, 13	Oct 23, 14	494.29	497.78		-3.49	
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Account name:  
Account number:EDISON INNOVATION FOUNDATION  
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732-223-5910/888-413-7785

## Realized gains and losses (continued)

## Long-term capital gains and losses (continued)

Security description	Method	Quantity or face value	Purchase date	Sale date	Sale amount (\$)	Cost basis (\$)	Wash sale cost basis adjustment (\$)	Loss (\$)	Gain (\$)
HALLYARD HEALTH INC	FIFO	0.750	Sep 06, 13	Nov 03, 14	28.74	23.26			5.48
	FIFO	6.000	Sep 06, 13	Dec 03, 14	221.76	186.09			35.67
HONDA MOTOR CO ADR JAPAN ADR	FIFO	79.000	Sep 06, 13	Oct 02, 14	2,523.11	3,009.07		-485.96	
INTL PAPER CO	FIFO	4.000	Sep 06, 13	Sep 11, 14	199.99	189.23			10.76
PEOPLE'S UNITED FINANCIAL INC	FIFO	138.000	Sep 06, 13	Oct 28, 14	1,972.26	1,978.30		-6.04	
QUALCOMM INC	FIFO	13.000	Sep 06, 13	Nov 04, 14	1,007.26	887.64			119.62
	FIFO	15.000	Sep 06, 13	Nov 06, 14	1,056.71	1,024.20			32.51
UNITEDHEALTH GROUP INC	FIFO	9.000	Sep 06, 13	Oct 28, 14	819.03	671.01			148.02
	FIFO	13.000	Sep 06, 13	Nov 07, 14	1,227.68	965.24			258.44
UNTD TECHNOLOGIES CORP	FIFO	16.000	Sep 06, 13	Nov 25, 14	1,790.64	1,658.88			131.76
WASTE MGMT INC NEW	FIFO	27.000	Sep 06, 13	Oct 29, 14	1,283.85	1,079.61			204.24
Total					\$15,771.51	\$15,391.11		-\$567.08	\$947.48
Net long-term capital gains or losses									\$380.40
Net capital gains/losses:									\$1,513.13

