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Form 990 — Return of Organization Exempt From Income Tax

OMB No 1545-0047

2016

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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*

A For the 2016 calendar year, or tax year beginning 01-01-2016 , and ending 12-31-2016

B Check if applicable
☐ Address change
☐ Name change
☐ Initial return
☐ Final return/terminated
☐ Amended return
☐ Application pending

C Name of organization
MU ALPHA THETA NATL HIGH SCHOOL &
TWO-YEAR COLLEGE MATHEMATICS HONOR

Doing business as
MU ALPHA THETA

Number and street (or P O box if mail is not delivered to street address) | Room/suite
C/O UNIV OF OKLA 3200 MARSHALL AVE

City or town, state or province, country, and ZIP or foreign postal code
NORMAN, OK 73019

D Employer identification number
73-6097246

E Telephone number
(405) 325-4489

G Gross receipts $ 656,002

F Name and address of principal officer
JENNIFER BOOKWALTER
3200 MARSHALL AVE SUITE 190
NORMAN, OK 73019

H(a) Is this a group return for subordinates? ☐ Yes ☑ No
H(b) Are all subordinates included? ☐ Yes ☐ No
If "No," attach a list (see instructions)
H(c) Group exemption number ▶

I Tax-exempt status ☐ 501(c)(3) ☑ 501(c) (7) ◀(insert no) ☐ 4947(a)(1) or ☐ 527

J Website: ▶ WWW MUALPHATHETA ORG

K Form of organization ☑ Corporation ☐ Trust ☐ Association ☐ Other ▶

L Year of formation 1967 **M** State of legal domicile OK

Part I Summary

Activities & Governance

1 Briefly describe the organization's mission or most significant activities
THE ORGANIZATION PROMOTES THE ENJOYMENT AND SCHOLARSHIP OF MATHEMATICS BY PROVIDING MATH-RELATED ACTIVITIES AND RESOURCES TO HIGH-SCHOOL AND TWO-YEAR COLLEGE STUDENTS THE ORGANIZATION PROVIDES AWARDS TO STUDENTS FOR OUTSTANDING EXTRACURRICULAR ACHIEVEMENT IN MATHEMATICS SCHOLARSHIPS AND GRANTS ARE AWARDED TO MATHEMATICALLY TALENTED MEMBERS TO HELP REDUCE THE FINANCIAL BURDEN OF ATTENDING COLLEGE THE ORGANIZATION FINANCIALLY SUPPORTS THE MATHEMATICAL ACTIVITIES OF ITS CHAPTERS WITH GRANTS THE ORGANIZATION SUPPORTS MULTIPLE MATHEMATICS COMPETITIONS IN WHICH PARTICIPATION IS FREE OF CHARGE TO ITS MEMBERS ADDITIONALLY, MU ALPHA THETA PROVIDES FREE GRAPHING CALCULATORS, MATHEMATICS SOFTWARE, AND MATH- RELATED DVDS AS PRIZES TO CHAPTERS

2 Check this box ▶ ☐ if the organization discontinued its operations or disposed of more than 25% of its net assets

3	Number of voting members of the governing body (Part VI, line 1a)	3	11
4	Number of independent voting members of the governing body (Part VI, line 1b)	4	11
5	Total number of individuals employed in calendar year 2016 (Part V, line 2a)	5	0
6	Total number of volunteers (estimate if necessary)	6	4,550
7a	Total unrelated business revenue from Part VIII, column (C), line 12	7a	6,741
b	Net unrelated business taxable income from Form 990-T, line 34	7b	

			Prior Year	Current Year
Revenue	8	Contributions and grants (Part VIII, line 1h)		0
	9	Program service revenue (Part VIII, line 2g)	581,208	582,081
	10	Investment income (Part VIII, column (A), lines 3, 4, and 7d)	5,660	6,741
	11	Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	49,288	45,990
	12	Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	636,156	634,812
Expenses	13	Grants and similar amounts paid (Part IX, column (A), lines 1–3)	232,288	232,979
	14	Benefits paid to or for members (Part IX, column (A), line 4)		0
	15	Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	155,327	203,506
	16a	Professional fundraising fees (Part IX, column (A), line 11e)		0
	b	Total fundraising expenses (Part IX, column (D), line 25) ▶0		
	17	Other expenses (Part IX, column (A), lines 11a–11d, 11f–24e)	153,629	182,511
	18	Total expenses Add lines 13–17 (must equal Part IX, column (A), line 25)	541,244	618,996
	19	Revenue less expenses Subtract line 18 from line 12	94,912	15,816

			Beginning of Current Year	End of Year
Net Assets or Fund Balances	20	Total assets (Part X, line 16)	977,037	993,744
	21	Total liabilities (Part X, line 26)	890	1,100
	22	Net assets or fund balances Subtract line 21 from line 20	976,147	992,644

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

****** 2017-08-31
Signature of officer Date

JENNIFER BOOKWALTER EXECUTIVE DIRECTOR
Type or print name and title

Paid Preparer Use Only

Print/Type preparer's name	Preparer's signature	Date	Check ☐ if self-employed	PTIN
C JANESE SHEPARD	C JANESE SHEPARD	2017-08-31		P00162034

Firm's name ▶ GRAY BLODGETT & COMPANY PLLC | Firm's EIN ▶ 73-1352810
Firm's address ▶ 629 24TH AVE SW NORMAN, OK 730693912 | Phone no (405) 360-5533

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

THE ORGANIZATION PROMOTES THE ENJOYMENT AND SCHOLARSHIP OF MATHEMATICS BY PROVIDING MATH-RELATED ACTIVITIES AND RESOURCES TO HIGH-SCHOOL AND TWO-YEAR COLLEGE STUDENTS THE ORGANIZATION PROVIDES AWARDS TO STUDENTS FOR OUTSTANDING EXTRACURRICULAR ACHIEVEMENT IN MATHEMATICS SCHOLARSHIPS AND GRANTS ARE AWARDED TO MATHEMATICALLY TALENTED MEMBERS TO HELP REDUCE THE FINANCIAL BURDEN OF ATTENDING COLLEGE THE ORGANIZATION FINANCIALLY SUPPORTS THE MATHEMATICAL ACTIVITIES OF ITS CHAPTERS WITH GRANTS THE ORGANIZATION SUPPORTS MULTIPLE MATHEMATICS COMPETITIONS IN WHICH PARTICIPATION IS FREE OF CHARGE TO ITS MEMBERS ADDITIONALLY, MU ALPHA THETA PROVIDES FREE GRAPHING CALCULATORS, MATHEMATICS SOFTWARE, AND MATH-RELATED DVDS AS PRIZES TO CHAPTERS

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 $ including grants of $) (Revenue $)
See Additional Data

4b (Code) (Expenses $ including grants of $) (Revenue $)
See Additional Data

4c (Code) (Expenses $ including grants of $) (Revenue $)
See Additional Data

4d Other program services (Describe in Schedule O)
(Expenses $ including grants of $) (Revenue $)

4e **Total program service expenses** ▶

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		No
2	Is the organization required to complete *Schedule B, Schedule of Contributors* (see instructions)?	2		No
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	**Section 501(c)(3) organizations.** Did the organization engage in lobbying activities, or have a section 501(h) election in effect during the tax year? *If "Yes," complete Schedule C, Part II*	4		
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		No
f	Did the organization's separate or consolidated financial statements for the tax year include a footnote that addresses the organization's liability for uncertain tax positions under FIN 48 (ASC 740)? *If "Yes," complete Schedule D, Part X*	11f		No
12a	Did the organization obtain separate, independent audited financial statements for the tax year? *If "Yes," complete Schedule D, Parts XI and XII*	12a		No
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

Part IV Checklist of Required Schedules *(continued)*

			Yes	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		
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		No
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		
c	Did the organization maintain an escrow account other than a refunding escrow at any time during the year to defease any tax-exempt bonds?	24c		
d	Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?	24d		
25a	**Section 501(c)(3), 501(c)(4), and 501(c)(29) organizations.** Did the organization engage in an excess benefit transaction with a disqualified person during the year? *If "Yes," complete Schedule L, Part I*	25a		
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		
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	Yes	
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		
36	**Section 501(c)(3) organizations.** Did the organization make any transfers to an exempt non-charitable related organization? *If "Yes," complete Schedule R, Part V, line 2*	36		
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? **Note.** All Form 990 filers are required to complete Schedule O	38	Yes	

Part V **Statements Regarding Other IRS Filings and Tax Compliance**

Check if Schedule O contains a response 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 . .	**1a**	14			
b	Enter the number of Forms W-2G included in line 1a *Enter -0-* if not applicable	**1b**	0			
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?			**1c**	Yes	
2a	Enter the number of employees reported on Form W-3, Transmittal of Wage and Tax Statements, filed for the calendar year ending with or within the year covered by this return	**2a**	0			
b	If at least one is reported on line 2a, did the organization file all required federal employment tax returns? **Note.**If the sum of lines 1a and 2a is greater than 250, you may be required to e-file (see instructions)			**2b**		
3a	Did the organization have unrelated business gross income of $1,000 or more during the year? . . .			**3a**	Yes	
b	If "Yes," has it filed a Form 990-T for this year?*If "No" to line 3b, provide an explanation in Schedule O* . . .			**3b**	Yes	
4a	At any time during the calendar year, did the organization have an interest in, or a signature or other authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)? . .			**4a**		No
b	If "Yes," enter the name of the foreign country ▶ 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? . .			**5a**		No
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?			**5b**		No
c	If "Yes," to line 5a or 5b, did the organization file Form 8886-T?			**5c**		
6a	Does the organization have annual gross receipts that are normally greater than $100,000, and did the organization solicit any contributions that were not tax deductible as charitable contributions? . . .			**6a**		No
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?			**6b**		
7	**Organizations that may receive deductible contributions under section 170(c).**					
a	Did the organization receive a payment in excess of $75 made partly as a contribution and partly for goods and services provided to the payor?			**7a**		
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?			**7b**		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?			**7c**		
d	If "Yes," indicate the number of Forms 8282 filed during the year	**7d**				
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?			**7e**		
f	Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract? . .			**7f**		
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?			**7g**		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?			**7h**		
8	**Sponsoring organizations maintaining donor advised funds.** Did a donor advised fund maintained by the sponsoring organization have excess business holdings at any time during the year?			**8**		
9a	Did the sponsoring organization make any taxable distributions under section 4966? . . .			**9a**		
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person? . . .			**9b**		
10	**Section 501(c)(7) organizations.** Enter					
a	Initiation fees and capital contributions included on Part VIII, line 12 . . .	**10a**	579,996			
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities	**10b**				
11	**Section 501(c)(12) organizations.** Enter					
a	Gross income from members or shareholders	**11a**				
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them)	**11b**				
12a	**Section 4947(a)(1) non-exempt charitable trusts.** Is the organization filing Form 990 in lieu of Form 1041?			**12a**		
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year	**12b**				
13	**Section 501(c)(29) qualified nonprofit health insurance issuers.**					
a	Is the organization licensed to issue qualified health plans in more than one state?**Note.** See the instructions for additional information the organization must report on Schedule O			**13a**		
b	Enter the amount of reserves the organization is required to maintain by the states in which the organization is licensed to issue qualified health plans	**13b**				
c	Enter the amount of reserves on hand	**13c**				
14a	Did the organization receive any payments for indoor tanning services during the tax year?			**14a**		No
b	If "Yes," has it filed a Form 720 to report these payments?*If "No," provide an explanation in Schedule O* . .			**14b**		

Part VI **Governance, Management, and Disclosure** *For each "Yes" response to lines 2 through 7b below, and for a "No" response to lines 8a, 8b, or 10b below, describe the circumstances, processes, or changes in Schedule O See instructions*

Check if Schedule O contains a response 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	1a	11		
	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				
b	Enter the number of voting members included in line 1a, above, who are independent	1b	11		
2	Did any officer, director, trustee, or key employee have a family relationship or a business relationship with any other officer, director, trustee, or key employee?		2		No
3	Did the organization delegate control over management duties customarily performed by or under the direct supervision of officers, directors or trustees, or key employees to a management company or other person?		3		No
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?		4		No
5	Did the organization become aware during the year of a significant diversion of the organization's assets?		5		No
6	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
b	Are any governance decisions of the organization reserved to (or subject to approval by) members, stockholders, or persons other than the governing body?		7b		No
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following				
a	The governing body?		8a	Yes	
b	Each committee with authority to act on behalf of the governing body?		8b	Yes	
9	Is there any officer, director, trustee, or key employee listed in Part VII, Section A, who cannot be reached at the organization's mailing address? *If "Yes," provide the names and addresses in Schedule O*		9	Yes	

Section B. Policies (*This Section B requests information about policies not required by the Internal Revenue Code.*)

			Yes	No
10a	Did the organization have local chapters, branches, or affiliates?	10a	Yes	
b	If "Yes," did the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with the organization's exempt purposes?	10b	Yes	
11a	Has the organization provided a complete copy of this Form 990 to all members of its governing body before filing the form?	11a	Yes	
b	Describe in Schedule O the process, if any, used by the organization to review this Form 990			
12a	Did the organization have a written conflict of interest policy? *If "No," go to line 13*	12a	Yes	
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	Yes	
c	Did the organization regularly and consistently monitor and enforce compliance with the policy? *If "Yes," describe in Schedule O how this was done*	12c	Yes	
13	Did the organization have a written whistleblower policy?	13	Yes	
14	Did the organization have a written document retention and destruction policy?	14	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?			
a	The organization's CEO, Executive Director, or top management official	15a	Yes	
b	Other officers or key employees of the organization	15b		No
	If "Yes" to line 15a or 15b, describe the process in Schedule O (see instructions)			
16a	Did the organization invest in, contribute assets to, or participate in a joint venture or similar arrangement with a taxable entity during the year?	16a		No
b	If "Yes," did the organization follow a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and take steps to safeguard the organization's exempt status with respect to such arrangements?	16b		

Section C. Disclosure

17 List the States with which a copy of this Form 990 is required to be filed▶ OK

18 Section 6104 requires an organization to make its Form 1023 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection Indicate how you made these available Check all that apply

☐ Own website ☐ Another's website ☑ Upon request ☐ 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
▶J BOOKWALTER - CO UNIV OF OKLA 3200 MARSHALL AVE SUITE 190 NORMAN, OK 73019 (405) 325-4489

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: Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(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
(1) BETTY HOOD PRESIDENT	4 00 1 00	X		X				0	0	0
(2) KATHY MOWERS PRESIDENT EL	4 00 1 00	X		X				0	0	0
(3) DR JOHN ALBERT TREASURER	5 00 2 00	X		X				0	0	0
(4) DR DEANNA WASMAN GOVERNOR REG	1 00 1 00	X						0	0	0
(5) OLVIN CARIAS GOVERNOR REG	1 00 1 00	X						0	0	0
(6) RITA RALPH GOVERNOR REG	1 50 1 00	X						0	0	0
(7) KIM WOOLFENDEN GOVERNOR REG	1 50 1 00	X						0	0	0
(8) DR CHUCK GARNER MAA REPRESEN	0 50 0 50	X						0	0	0
(9) LAURA ENTREKIN NCTM REPRESE	0 50 0 50	X						0	0	0
(10) DR TERRY HERDMAN SIAM REP	2 00 1 00	X						0	0	0
(11) PAIGE PERRY AMATYC REP	0 50 0 50	X						0	0	0
(12) KAY WEISS EXECUTIVE DI	45 00 20 00			X				66,848	7,428	24,505
(13) JENNIFER BOOKWALTER EXECUTIVE DI	45 00 15 00			X				27,450	3,050	10,136

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: Individual trustee or director	Institutional Trustee	Officer	Key employee	Highest compensated employee	Former	(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

	(D)	(E)	(F)
1b Sub-Total ▶			
c Total from continuation sheets to Part VII, Section A ▶			
d Total (add lines 1b and 1c) ▶	94,298	10,478	34,641

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 ▶

			Yes	No
3	Did the organization list any **former** officer, director or trustee, key employee, or highest compensated employee on line 1a? *If "Yes," complete Schedule J for such individual*	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? *If "Yes," complete Schedule J for such individual*	4		No
5	Did any person listed on line 1a receive or accrue compensation from any unrelated organization or individual for services rendered to the organization? *If "Yes," complete Schedule J for such person*	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

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 ▶

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				
g Noncash contributions included in lines 1a-1f $					
h **Total.** Add lines 1a-1f . . . . ▶					
Program Service Revenue	Business Code				
2a MEMBERSHIP FEES	900099	579,996	579,996		
b CHARTER FEES	900099	2,085	2,085		
c					
d					
e					
f All other program service revenue					
g **Total.** Add lines 2a–2f . . . . ▶		582,081			
Other Revenue					
3 Investment income (including dividends, interest, and other similar amounts) . . . . . . ▶		6,741		6,741	
4 Income from investment of tax-exempt bond proceeds ▶					
5 Royalties . . . . ▶					

	(i) Real	(ii) Personal
6a Gross rents		
b Less rental expenses		
c Rental income or (loss)		

	(A)	(B)	(C)	(D)
d Net rental income or (loss) . . . . ▶				

	(i) Securities	(ii) Other
7a Gross amount from sales of assets other than inventory		
b Less cost or other basis and sales expenses		
c Gain or (loss)		

		(A)	(B)	(C)	(D)
d Net gain or (loss) . . . . . ▶					
8a Gross income from fundraising events (not including $ of contributions reported on line 1c) See Part IV, line 18 . . . . a					
b Less direct expenses . . . b					
c Net income or (loss) from fundraising events . . ▶					
9a Gross income from gaming activities See Part IV, line 19 . . . a					
b Less direct expenses . . . b					
c Net income or (loss) from gaming activities . . ▶					
10a Gross sales of inventory, less returns and allowances . . a	66,190				
b Less cost of goods sold . . b	21,190				
c Net income or (loss) from sales of inventory . . ▶		45,000	45,000		
Miscellaneous Revenue	Business Code				
11a SERVICE FEES	900099	990	990		
b					
c					
d All other revenue					
e **Total.** Add lines 11a–11d . . . . ▶		990			
12 **Total revenue.** See Instructions . . . . . ▶		634,812	628,071	6,741	

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) Fundraisingexpenses
1 Grants and other assistance to domestic organizations and domestic governments See Part IV, line 21	35,337			
2 Grants and other assistance to domestic individuals See Part IV, line 22	197,642			
3 Grants and other assistance to foreign organizations, foreign governments, and foreign individuals See Part IV, line 15 and 16				
4 Benefits paid to or for members				
5 Compensation of current officers, directors, trustees, and key employees	125,475			
6 Compensation not included above, to disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B)				
7 Other salaries and wages	58,846			
8 Pension plan accruals and contributions (include section 401 (k) and 403(b) employer contributions)				
9 Other employee benefits	19,185			
10 Payroll taxes				
11 Fees for services (non-employees)				
a Management				
b Legal				
c Accounting . . . . Accounting	1,250			
d Lobbying				
e Professional fundraising services See Part IV, line 17				
f Investment management fees				
g Other (If line 11g amount exceeds 10% of line 25, column (A) amount, list line 11g expenses on Schedule O)	42			
12 Advertising and promotion	2,660			
13 Office expenses	36,429			
14 Information technology	22,611			
15 Royalties . .				
16 Occupancy	23,715			
17 Travel	4,479			
18 Payments of travel or entertainment expenses for any federal, state, or local public officials .				
19 Conferences, conventions, and meetings	39,957			
20 Interest				
21 Payments to affiliates	185			
22 Depreciation, depletion, and amortization . .	218			
23 Insurance . . .	1,840			
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 CONTESTS & PRIZES	26,219			
b MEMBERSHIP SUPPLIES	13,457			
c MEMBERSHIP BENEFIT EXP	8,495			
d MISCELLANEOUS	954			
e All other expenses				
25 Total functional expenses. Add lines 1 through 24e	618,996	0	0	0
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 ▶ ☐ 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 IX . . . . ☐

					(A) Beginning of year		(B) End of year
Assets	1	Cash–non-interest-bearing			147,253	1	172,124
	2	Savings and temporary cash investments			784,880	2	755,433
	3	Pledges and grants receivable, net				3	
	4	Accounts receivable, net			1,018	4	1,206
	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	
	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	
	7	Notes and loans receivable, net				7	
	8	Inventories for sale or use			26,027	8	30,242
	9	Prepaid expenses and deferred charges				9	
	10a	Land, buildings, and equipment cost or other basis Complete Part VI of Schedule D	10a	5,170			
	b	Less accumulated depreciation	10b	4,733	655	10c	437
	11	Investments—publicly traded securities			17,204	11	34,302
	12	Investments—other securities See Part IV, line 11				12	
	13	Investments—program-related See Part IV, line 11				13	
	14	Intangible assets				14	
	15	Other assets See Part IV, line 11				15	
	16	**Total assets.** Add lines 1 through 15 (must equal line 34)			977,037	16	993,744
Liabilities	17	Accounts payable and accrued expenses			890	17	1,100
	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				25	
	26	**Total liabilities.** Add lines 17 through 25			890	26	1,100
Net Assets or Fund Balances		**Organizations that follow SFAS 117 (ASC 958), check here ▶ ☐ and complete lines 27 through 29, and lines 33 and 34.**					
	27	Unrestricted net assets				27	
	28	Temporarily restricted net assets				28	
	29	Permanently restricted net assets				29	
		Organizations that do not follow SFAS 117 (ASC 958), check here ▶ ☑ and complete lines 30 through 34.					
	30	Capital stock or trust principal, or current funds				30	
	31	Paid-in or capital surplus, or land, building or equipment fund				31	
	32	Retained earnings, endowment, accumulated income, or other funds			976,147	32	992,644
	33	Total net assets or fund balances			976,147	33	992,644
	34	Total liabilities and net assets/fund balances			977,037	34	993,744

Part XI Reconcilliation 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	634,812
2	Total expenses (must equal Part IX, column (A), line 25)	2	618,996
3	Revenue less expenses Subtract line 2 from line 1	3	15,816
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A)) . .	4	976,147
5	Net unrealized gains (losses) on investments	5	710
6	Donated services and use of facilities	6	
7	Investment expenses	7	
8	Prior period adjustments	8	-29
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	992,644

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 ☑ Cash ☐ Accrual ☐ Other ____________ If the organization changed its method of accounting from a prior year or checked "Other," explain in Schedule O			
2a	Were the organization's financial statements compiled or reviewed by an independent accountant?	2a		No
	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 ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
b	Were the organization's financial statements audited by an independent accountant?	2b		No
	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 ☐ Separate basis ☐ Consolidated basis ☐ Both consolidated and separate basis			
c	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?	2c		
	If the organization changed either its oversight process or selection process during the tax year, explain in Schedule O			
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?	3a		No
b	If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits	3b		

Additional Data

Software ID:

Software Version:

EIN: 73-6097246

Name: MU ALPHA THETA NATL HIGH SCHOOL & TWO-YEAR COLLEGE MATHEMATICS HONOR

Form 990 (2016)

Form 990, Part III, Line 4a:

MU ALPHA THETA PRESENTED THIRTY-SIX 4,000 SCHOLARSHIPS TO ITS MEMBERS APPLYING STUDENTS WERE JUDGED ON THEIR MATHEMATICAL ABILITIES, LEADERSHIP QUALITIES, AND SERVICE TO THEIR CHAPTERS OF MU ALPHA THETA MANY WINNERS WILL PURSUE A CAREER IN MATHEMATICS OR APPLIED MATHEMATICS IN 2016, MU ALPHA THETA SUPPORTED TWENTY-TWO MEMBERS WITH SUMMER STUDY GRANTS GRANT MONEY PROVIDED UP TO 2,000 PER RECIPIENT IN TUITION FUNDING AND LIVING EXPENSES THE SUMMER STUDY PROGRAMS OUR MEMBERS ATTENDED WERE COMPRISED OF HIGHER-LEVEL MATHEMATICS COURSES THAT WERE INTENDED FOR HIGH- ACHIEVING HIGH-SCHOOL STUDENTS THESE PROGRAMS PROVIDED FOR THE STUDY OF ABSTRACT AND APPLIED MATHEMATICS TOPICS SOME PROGRAMS OFFERED THE OPPORTUNITY FOR STUDENTS TO DO INDEPENDENT RESEARCH USING MATHEMATICS AT THE HIGHEST LEVELS THIS YEAR, MU ALPHA THETA PROVIDED TWENTY NEED-BASED CONVENTION SCHOLARSHIPS FOR STUDENTS WHO COULD NOT HAVE ATTENDED OUR EDUCATIONAL FOUNDATION'S ANNUAL NATIONAL CONVENTION WITHOUT OUR SUPPORT THE ORGANIZATION SUPPORTED THE ACTIVITIES OF TWENTY-SIX OF ITS CHAPTERS WITH CHAPTER GRANTS UP TO 1,000 EACH AND THIRTY-TWO OF ITS CHAPTERS WITH COMPETITION GRANTS UP TO 500 EACH

Form 990, Part III, Line 4b:

MU ALPHA THETA, THE NATIONAL HIGH SCHOOL AND TWO-YEAR COLLEGE MATHEMATICS HONOR SOCIETY, CONTINUED TO SUPPORT SEVERAL MATHEMATICS COMPETITIONS STUDENTS WHO COMPETE IN MATHEMATICS COMPETITIONS OFTEN ENJOY MATHEMATICS AND PURSUE THE TOPIC AT HIGHER LEVELS, TO INCLUDE PURSUING A MATHEMATICS, SCIENCE, OR MATHEMATICS EDUCATION CAREER THE LOG 1 CONTEST AND THE ROCKET CITY MATH LEAGUE COMPETITION HAD MORE THAN 8,500 PARTICIPANTS IN THE U S AND IN FOREIGN COUNTRIES THESE COMPETITIONS WERE OFFERED FREE OF CHARGE THE LOG 1 CONTEST INTRODUCED MEMBERS TO COMPETITIONS LIKE THOSE AT OUR ANNUAL NATIONAL CONVENTION THE ROCKET CITY MATH LEAGUE WAS OPEN TO ALL MIDDLE- SCHOOL THROUGH TWO-YEAR COLLEGE STUDENTS PRIZES INCLUDED CERTIFICATES, TROPHIES, PLAQUES, MATHEMATICAL GAMES AND PUZZLES, FREE GRAPHING CALCULATORS, AND COPIES OF "HARD PROBLEMS" DVDS STUDENTS MADE FUN, EDUCATIONAL, SHORT VIDEOS TO TEACH MATH LESSONS TO OTHER STUDENTS IN MU ALPHA THETA'S MATHEMATICAL MINUTES CONTEST VIDEOS WERE SCORED ON THEIR ORIGINALITY, ACCURACY, AND THEIR "WOW" FACTOR WINNERS' VIDEOS WERE POSTED ONLINE AND THEIR CHAPTERS WERE GIVEN CASH AWARDS MU ALPHA THETA SUPPORTED THE AMERICAN MATHEMATICS COMPETITION AND THE U S MATHEMATICS OLYMPIAD TEAM BY PROVIDING FINANCIAL SUPPORT AND PRIZES TO FINALISTS THE ORGANIZATION ALSO PROVIDED PRIZES AND FINANCIAL SUPPORT TO TWENTY-SEVEN ADDITIONAL ORGANIZATIONS' MATH COMPETITIONS MU ALPHA THETA PURCHASED TI GRAPHING CALCULATORS AT A REDUCED COST AND GAVE THEM TO CHAPTERS THAT REQUESTED THEM RECEIVING CHAPTERS USED THE CALCULATORS AS PRIZES FOR THEIR MATH CONTESTS, AUCTIONED THE CALCULATORS FOR FUNDRAISERS, OR GAVE THEM AWAY AS AWARDS TO TALENTED CHAPTER MEMBERS MU ALPHA THETA ALSO PROVIDED OTHER PRIZES TO CHAPTERS RUNNING MATH COMPETITIONS FOR MIDDLE SCHOOL AND HIGH SCHOOL STUDENTS

Form 990, Part III, Line 4c:

MU ALPHA THETA PROVIDED AWARDS AT SCIENCE FAIRS AROUND THE COUNTRY FOR OUTSTANDING RESEARCH PROJECTS INVOLVING MATHEMATICS ACCESSIBLE TO HIGH SCHOOL STUDENTS AT THE INTEL INTERNATIONAL SCIENCE AND ENGINEERING FAIR, 6,000 IN AWARD MONEY WAS PRESENTED TO SIX STUDENTS WITH THE TOP MATHEMATICS PROJECTS AS DEEMED BY MU ALPHA THETA'S JUDGES MU ALPHA THETA PROVIDED SUPPORT TO ITS EDUCATIONAL FOUNDATION THIS YEAR, INCLUDING FUNDS TO SUPPORT THE FOUNDATION'S ANNUAL NATIONAL CONVENTION 785 MU ALPHA THETA MEMBERS, SPONSORS, AND CHAPERONES ATTENDED THE 2016 NATIONAL CONVENTION IN ST LOUIS, MO MEMBERS TOOK THREE ROUNDS OF MATHEMATICS TOPIC TESTS, INCLUDING TOPICS LIKE ANALYTIC GEOMETRY, LIMITS/DERIVATIVES, STATISTICS, NUMBER THEORY, AND MANY OTHERS STUDENTS TOOK TESTS ON MULTIPLE MATH TOPICS THERE WERE TEAM MATH CONTESTS, SPEED AND MENTAL MATH TESTS, AND A MATH-THEMED POSTER DESIGN CONTEST SOME STUDENTS PREPARED A MATH "CHALK TALK" ON A SELECTED MATH TOPIC TO PRESENT TO AN AUDIENCE STUDENTS ATTENDED SPEAKER SESSIONS PRESENTED BY MATHEMATICIANS AN ADDITIONAL BENEFIT OF THE NATIONAL CONVENTION WAS THAT IT ALLOWED STUDENTS WHO LOVE MATH TO INTERACT WITH LIKE-MINDED PEERS

SCHEDULE D (Form 990)

Department of the Treasury Internal Revenue Service

Supplemental Financial Statements

▶ Complete if the organization answered "Yes," on 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*.

OMB No 1545-0047

2016

Open to Public Inspection

Name of the organization
MU ALPHA THETA NATL HIGH SCHOOL &
TWO-YEAR COLLEGE MATHEMATICS HONOR

Employer identification number
73-6097246

Part I Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts.

Complete if the organization answered "Yes" on 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? ☐ Yes ☐ No

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? ☐ Yes ☐ No

Part II Conservation Easements. Complete if the organization answered "Yes" on 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
a	Total number of conservation easements	2a	
b	Total acreage restricted by conservation easements	2b	
c	Number of conservation easements on a certified historic structure included in (a)	2c	
d	Number of conservation easements included in (c) acquired after 8/17/06, and not on a historic structure listed in the National Register	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, handling of violations, and enforcing conservation easements during the year ▶ ______

7 Amount of expenses incurred in monitoring, inspecting, handling of violations, 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" on 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

b 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 on 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 on Form 990, Part VIII, line 1 ▶ $ ______

b Assets included in Form 990, Part X ▶ $ ______

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

3 Using the organization's 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
d ☐ Loan or exchange programs
b ☐ Scholarly research
e ☐ Other
c ☐ Preservation for future generations

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" on 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

			Amount
b	If "Yes," explain the arrangement in Part XIII and complete the following table		
c	Beginning balance	1c	
d	Additions during the year	1d	
e	Distributions during the year	1e	
f	Ending balance	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" on Form 990, Part IV, line 10.

	(a) Current year	**(b)** Prior year	**(c)** Two years back	**(d)** Three years back	**(e)** Four years back
1a Beginning of year balance					
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 on 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

			Yes	No
	(i) unrelated organizations	3a(i)		
	(ii) related organizations	3a(ii)		
b	If "Yes" on 3a(ii), are the related organizations listed as required on Schedule R?	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' on 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 . . .		4,078	4,078	
e Other . . .		1,092	655	437
Total. Add lines 1a through 1e *(Column (d) must equal Form 990, Part X, column (B), line 10(c))* . . ▶				437

Part VII **Investments—Other Securities.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 11b. See Form 990, Part X, line 12.

(a) Description of security or category (including name of security)	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1) Financial derivatives		
(2) Closely-held equity interests		
(3) Other		
(A)		
(B)		
(C)		
(D)		
(E)		
(F)		
(G)		
(H)		
Total. *(Column (b) must equal Form 990, Part X, col (B) line 12)* ▶		

Part VIII **Investments—Program Related.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 11c. See Form 990, Part X, line 13.

(a) Description of investment	(b) Book value	(c) Method of valuation Cost or end-of-year market value
(1)		
(2)		
(3)		
(4)		
(5)		
(6)		
(7)		
(8)		
(9)		
Total. *(Column (b) must equal Form 990, Part X, col (B) line 13)* ▶		

Part IX **Other Assets.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 11d See Form 990, Part X, line 15

(a) Description	(b) Book value
(1)	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col (B) line 15)* ▶	

Part X **Other Liabilities.** Complete if the organization answered 'Yes' on Form 990, Part IV, line 11e or 11f. See Form 990, Part X, line 25.

1. (a) Description of liability	(b) Book value
(1) Federal income taxes	
(2)	
(3)	
(4)	
(5)	
(6)	
(7)	
(8)	
(9)	
Total. *(Column (b) must equal Form 990, Part X, col (B) line 25)* ▶	

2. Liability for uncertain tax positions In Part XIII, provide the text of the footnote to the organization's financial statements that reports the organization's liability for uncertain tax positions under FIN 48 (ASC 740) Check here if the text of the footnote has been provided in Part XIII ☐

Part XI **Reconciliation of Revenue per Audited Financial Statements With Revenue per Return**
Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total revenue, gains, and other support per audited financial statements			1	
2	Amounts included on line 1 but not on Form 990, Part VIII, line 12				
a	Net unrealized gains (losses) on investments	2a			
b	Donated services and use of facilities	2b			
c	Recoveries of prior year grants	2c			
d	Other (Describe in Part XIII)	2d			
e	Add lines **2a** through **2d**			2e	
3	Subtract line **2e** from line **1**			3	
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	

Part XII **Reconciliation of Expenses per Audited Financial Statements With Expenses per Return.**
Complete if the organization answered 'Yes' on Form 990, Part IV, line 12a.

1	Total expenses and losses per audited financial statements			1	
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	
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	

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	

Part XIII Supplemental Information *(continued)*

Return Reference	Explanation

Schedule I (Form 990)

Department of the Treasury
Internal Revenue Service

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

Complete if the organization answered "Yes," on 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*.

OMB No 1545-0047

2016

Open to Public Inspection

Name of the organization
MU ALPHA THETA NATL HIGH SCHOOL &
TWO-YEAR COLLEGE MATHEMATICS HONOR

Employer identification number
73-6097246

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" on 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) GRISSOM HIGH SCHOOL-MU ALPHA THETA 7901 BAILEY COVE RD HUNTSVILLE, AL 35802	63-6000813	170(B)	5,008				ROCKET CITY MATH CON

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

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

Part III **Grants and Other Assistance to Domestic Individuals.** Complete if the organization answered "Yes" on 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) SUMMER MATH STUDY GRANTS	22	40,183			
(2) ACADEMIC SCHOLARSHIPS	36	136,122			
(3) SCIENCE FAIR AWARDS	6	6,000			
(4) NEED-BASED CONVENTION SCH	39	15,337			
(4)					
(5)					
(6)					
(7)					

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**
SCHEDULE I, PAGE 1, PART I, LINE 2	BOTH THE LOG 1 CONTEST AND THE ROCKET CITY MATH LEAGUE GRANTS ARE REQUIRED TO FILE A FINANCIAL REPORT TO THE GOVERNING COUNCIL, INCLUDING ALL EXPENDITURES THE GOVERNING COUNCIL REVIEWS THE EXPENSES AND VOTES ON WHETHER TO EXTEND THE GRANTS FOR AN ADDITIONAL YEAR ALL ACADEMIC SCHOLARSHIP FUNDS ARE SENT DIRECTLY TO THE UNIVERSITY THAT THE STUDENT WILL ATTEND THE UNIVERSITY IS INSTRUCTED TO ALLOW THE USE OF THE FUNDS ONLY FOR TUITION, FEES OR BOOKS FOR THE STUDENT SUMMER GRANT FUNDS ARE SENT DIRECTLY TO THE UNIVERSITY OR MATH PROGRAM TO PAY TUITION/ROOM/MEALS FOR AWARDEES, UNLESS THE STUDENT HAS ALREADY PAID THE FEES FEES ARE OFTEN DUE PRIOR TO THE APPROVAL OF THE GRANT, SINCE A GRANT WILL NOT BE APPROVED UNLESS THE STUDENT HAS BEEN ACCEPTED TO THE PROGRAM IN THIS CASE, MU ALPHA THETA CONTACTS THE PROGRAM TO ENSURE THAT THE FUNDS HAVE BEEN DEPOSITED AND THEN REIMBURSES THE STUDENT FOR THE APPROPRIATE AMOUNT SPENT WHEN FUNDS ARE SENT AS A REIMBURSEMENT, THEY ARE REPORTED AS MISCELLANEOUS INCOME TO THE STUDENT AND A 1099 IS SENT THE FOLLOWING JANUARY NEED-BASED SCHOLARSHIPS ARE PROVIDED TO TWO STUDENTS FROM EACH SCHOOL ATTENDING THE NATIONAL CONVENTION WHO MIGHT NEED SUPPORT TO COVER EXPENSES STUDENTS APPLY THROUGH THEIR SCHOOL AND ARE SELECTED IF DEEMED QUALIFIED FOR SUPPORT MOST RECIPIENTS COULD NOT ATTEND THE CONVENTION WITHOUT THE SCHOLARSHIP THE SCHOLARSHIP PAYS FOR THE STUDENT'S REGISTRATION COST AND REIMBURSES UP TO 300 IN TRAVEL EXPENSES
SCHEDULE I, PAGE 4, PART IV	GRISSOM HIGH SCHOOL-ROCKET CITY MATH CONTEST - 5,008 TOTAL GRANT THE SPONSOR AND STUDENTS OF GRISSOM HIGH SCHOOL'S MU ALPHA THETA CHAPTER PLAN AND RUN THE ROCKET CITY MATH LEAGUE COMPETITION THE STUDENTS PROVIDE BOTH A TEAM TEST AND THREE THEMED MATH TESTS FOR STUDENTS AT FIVE LEVELS OF MATH KNOWLEDGE THEY RUN THE WEBSITE, REGISTRATION, WRITE AND PROOF THE TESTS, COMMUNICATE WITH PARTICIPANTS, DETERMINE WINNERS, AND SEND OUT CERTIFICATES AND TROPHIES, AS WELL AS OTHER PRIZES STUDENTS FROM MIDDLE SCHOOL AGE TO COLLEGE STUDENTS MAY PARTICIPATE IN THE CONTESTS AND STUDENTS DO NOT HAVE TO BE MEMBERS OF MU ALPHA THETA TO COMPETE ANY FUNDS REMAINING AFTER COSTS AND PRIZES ARE AWARDED ARE USED TO PROVIDE SCHOLARSHIP MONEY TO GRADUATING SENIOR STUDENTS RUNNING THE CONTEST THIS PAST YEAR OVER 5,300 STUDENTS PARTICIPATED IN THE CONTESTS HOOVER HIGH SCHOOL - LOG 1 GRANT - 3,750 TOTAL GRANT THE SPONSOR AND STUDENTS OF THE HOOVER HIGH SCHOOL MU ALPHA THETA CHAPTER RUN THE LOG 1 CONTEST FOR MU ALPHA THETA THE STUDENTS USE THE FUNDS TO PAY FOR TEST WRITING, POSTAGE, CERTIFICATES, PRINTING, PLAQUES, AND PRIZE SHIPPING REMAINING FUNDS AFTER CONTEST EXPENSES ARE PAID ARE USED AS SCHOLARSHIP MONEY TO DEFRAY COSTS OF THE STUDENTS TO ATTEND THE NATIONAL CONVENTION THIS PAST YEAR, OVER 3,200 STUDENTS COMPETED IN THE LOG 1 MATH CONTEST IN OVER 100 SCHOOLS AROUND THE COUNTRY AND A NUMBER OF FOREIGN COUNTRIES AFTER THE CONTEST IS COMPLETED, A REPORT IS MADE TO THE GOVERNING COUNCIL OF MU ALPHA THETA, INCLUDING A FINANCIAL ACCOUNTING OF HOW GRANT FUNDS WERE SPENT MU ALPHA THETA ALSO OFFERS CHAPTER AND COMPETITION GRANTS TO OUR SCHOOLS FUNDS ARE USED TO REIMBURSE CHAPTERS FOR ACTIVITIES OR MATH COMPETITIONS IN WHICH THEIR STUDENTS PARTICIPATE

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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.

OMB No 1545-0047

2016

Open to Public Inspection

Name of the organization
MU ALPHA THETA NATL HIGH SCHOOL &
TWO-YEAR COLLEGE MATHEMATICS HONOR

Employer identification number
73-6097246

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990 - ORGANIZATION'S MISSION	THE ORGANIZATION PROMOTES THE ENJOYMENT AND SCHOLARSHIP OF MATHEMATICS BY PROVIDING MATH-R ELATED ACTIVITIES AND RESOURCES TO HIGH-SCHOOL AND TWO-YEAR COLLEGE STUDENTS THE ORGANIZA TION PROVIDES AWARDS TO STUDENTS FOR OUTSTANDING EXTRACURRICULAR ACHIEVEMENT IN MATHEMATIC S SCHOLARSHIPS AND GRANTS ARE AWARDED TO MATHEMATICALLY TALENTED MEMBERS TO HELP REDUCE T HE FINANCIAL BURDEN OF ATTENDING COLLEGE THE ORGANIZATION FINANCIALLY SUPPORTS THE MATHEM ATICAL ACTIVITIES OF ITS CHAPTERS WITH GRANTS THE ORGANIZATION SUPPORTS MULTIPLE MATHEMAT ICS COMPETITIONS IN WHICH PARTICIPATION IS FREE OF CHARGE TO ITS MEMBERS ADDITIONALLY, MU ALPHA THETA PROVIDES FREE GRAPHING CALCULATORS, MATHEMATICS SOFTWARE, AND MATH- RELATED D VDS AS PRIZES TO CHAPTERS

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PAGE 2, PART III, LINE 4A	THE HIGHEST LEVELS THIS YEAR, MU ALPHA THETA PROVIDED TWENTY NEED-BASED CONVENTION SCHOLA RSHIPS FOR STUDENTS WHO COULD NOT HAVE ATTENDED OUR EDUCATIONAL FOUNDATION'S ANNUAL NATION AL CONVENTION WITHOUT OUR SUPPORT THE ORGANIZATION SUPPORTED THE ACTIVITIES OF TWENTY-SIX OF ITS CHAPTERS WITH CHAPTER GRANTS UP TO 1,000 EACH AND THIRTY-TWO OF ITS CHAPTERS WITH COMPETITION GRANTS UP TO 500 EACH

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PAGE 2, PART III, LINE 4B	TROPHIES, PLAQUES, MATHEMATICAL GAMES AND PUZZLES, FREE GRAPHING CALCULATORS, AND COPIES O F "HARD PROBLEMS" DVDS STUDENTS MADE FUN, EDUCATIONAL, SHORT VIDEOS TO TEACH MATH LESSONS TO OTHER STUDENTS IN MU ALPHA THETA'S MATHEMATICAL MINUTES CONTEST VIDEOS WERE SCORED ON THEIR ORIGINALITY, ACCURACY, AND THEIR "WOW" FACTOR WINNERS' VIDEOS WERE POSTED ONLINE A ND THEIR CHAPTERS WERE GIVEN CASH AWARDS MU ALPHA THETA SUPPORTED THE AMERICAN MATHEMATIC S COMPETITION AND THE U S MATHEMATICS OLYMPIAD TEAM BY PROVIDING FINANCIAL SUPPORT AND PR IZES TO FINALISTS THE ORGANIZATION ALSO PROVIDED PRIZES AND FINANCIAL SUPPORT TO TWENTY-S EVEN ADDITIONAL ORGANIZATIONS' MATH COMPETITIONS MU ALPHA THETA PURCHASED TI GRAPHING CAL CULATORS AT A REDUCED COST AND GAVE THEM TO CHAPTERS THAT REQUESTED THEM RECEIVING CHAPTE RS USED THE CALCULATORS AS PRIZES FOR THEIR MATH CONTESTS, AUCTIONED THE CALCULATORS FOR F UNDRAISERS, OR GAVE THEM AWAY AS AWARDS TO TALENTED CHAPTER MEMBERS MU ALPHA THETA ALSO P ROVIDED OTHER PRIZES TO CHAPTERS RUNNING MATH COMPETITIONS FOR MIDDLE SCHOOL AND HIGH SCHO OL STUDENTS

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PAGE 2, PART III, LINE 4C	TOOK TESTS ON MULTIPLE MATH TOPICS THERE WERE TEAM MATH CONTESTS, SPEED AND MENTAL MATH TESTS, AND A MATH-THEMED POSTER DESIGN CONTEST SOME STUDENTS PREPARED A MATH "CHALK TALK" ON A SELECTED MATH TOPIC TO PRESENT TO AN AUDIENCE STUDENTS ATTENDED SPEAKER SESSIONS PRESENTED BY MATHEMATICIANS AN ADDITIONAL BENEFIT OF THE NATIONAL CONVENTION WAS THAT IT ALLOWED STUDENTS WHO LOVE MATH TO INTERACT WITH LIKE-MINDED PEERS

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PART V	LINE 2A - EMPLOYEES REPORTED ON FORM W-3 THE SALARY AND BENEFIT EXPENSES REPORTED ON FORM 990, PART IX, LINE 5 ARE EXPENSES INCURRED FOR HOURS OF SERVICE RENDERED BY CERTAIN INDIVI DUALS HOWEVER, THESE INDIVIDUALS ARE REPORTED ON FORM W-3 OF THE UNIVERSITY OF OKLAHOMA, AN AGENCY OF THE STATE OF OKLAHOMA THIS ORGANIZATION REIMBURSES THE UNIVERSITY OF OKLAHOM A FOR USE OF THESE EMPLOYEES' TIME CONSEQUENTLY, THIS ORGANIZATION DOES NOT FILE FORM W-3 , SO THIS QUESTION IS ANSWERED ZERO

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PAGE 6, PART VI, LINE 9	BETTY HOOD BRENTWOOD HS, 5304 MURRAY LN BRENTWOOD, TN 37027-6205 KATHY MOWERS 4800 NEW HAR TFORD RD OWENSBORO, KY 42303 DR JOHN ALBERT OU DEPT/MATH, 601 ELM AVENUE, RM 423 NORMAN, O K 73019 DR DEANNA WASMAN 1104 N PROVIDENCE RD COLUMBIA, MO 65203 OLVIN CARIAS 500 TIDWELL RD HOUSTON, TX 77022 RITA RALPH 1965 N COLUMBUS LANCASTER, OH 43130 KIM WOOLFENDEN 14220 N HWY 301 THONOTOSASSA , FL 33592 DR CHUCK GARNER 930 ROWLAND RD CONYERS, GA 30012 LAURA EN TREKIN 1000 BUCCANEER DR HOOVER, AL 35244 DR TERRY HERDMAN VA TECH CTR-APPLIED MATH, ICAM 0531 BLACKSBURG, VA 24061 PAIGE PERRY SUSCC 1701 LAFAYETTE PKWY OPELIKA, AL 36801

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PAGE 6, PART VI, LINE 11B	THE EXECUTIVE DIRECTOR WORKS WITH AN ACCOUNTING FIRM TO FILL OUT THE 990 FORMS WITH INPUT FROM THE TREASURER AFTER THE FORMS ARE COMPLETED, THE GOVERNING COUNCIL MEMBERS REVIEW AL L FORMS AT THEIR SUMMER GOVERNING COUNCIL MEETING ANY ITEM OF CONCERN IS DISCUSSED AT THA T MEETING CORRECTIONS ARE MADE WHEN THE FORMS MEET WITH THE APPROVAL OF ALL MEMBERS, THE RE IS A MOTION TO APPROVE THE RETURNS AND FILE THESE WITH THE IRS

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PAGE 6, PART VI, LINE 12C	MEMBERS OF THE GOVERNING COUNCIL FILL OUT A QUESTIONNAIRE DURING THE FIRST MEETING OF THE YEAR, USUALLY IN JANUARY OR FEBRUARY THE QUESTIONNAIRE REQUIRES THEM TO DISCLOSE ANY POSS IBLE CONFLICT OF INTEREST FOR THE COMING FISCAL YEAR SHOULD A CONFLICT OF INTEREST BE NOT ED, THE COUNCIL MEMBER WILL ABSTAIN FROM ANY DISCUSSION OR VOTES IDENTIFIED AS A POSSIBLE CONFLICT OF INTEREST

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PAGE 6, PART VI, LINE 15A	THE EXECUTIVE DIRECTOR IS THE ONLY SALARIED OFFICER HER SALARY WAS INITIALLY DETERMINED B Y THE TREASURER THE DETERMINATION WAS MADE BASED ON COMPARISONS WITH OTHER OFFICIALS AT T HE UNIVERSITY OF OKLAHOMA, INCLUDING DEVELOPMENT OFFICERS, FINANCIAL ASSOCIATES, AND ADMIN ISTRATORS, WHO HAVE DUTIES OVERLAPPING WITH HERS THIS YEAR, HER SALARY WAS COMPARED WITH EXECUTIVE DIRECTORS IN OKLAHOMA OF OTHER NON-PROFIT ORGANIZATIONS OF SIMILAR SIZE, USING S URVEY RESULTS COMPILED BY THE OKLAHOMA CENTER FOR NON-PROFITS THE TREASURER DISCUSSED HIS RECOMMENDATION WITH THE PRESIDENT AND THEN SUBMITTED THIS TO THE GOVERNING COUNCIL FOR AP PROVAL

990 Schedule O, Supplemental Information

Return Reference	Explanation
FORM 990, PAGE 6, PART VI, LINE 19	THE ORGANIZATION MAKES ITS NATIONAL CONSTITUTION AND CONFLICT OF INTEREST POLICY, ALONG WITH OTHER GOVERNANCE POLICIES, AVAILABLE AT ITS WEBSITE WWW MUALPHATHETA ORG>ABOUT US>GOVERNANCE FINANCIAL STATEMENTS ARE AVAILABLE, UPON REQUEST, FROM THE NATIONAL OFFICE NON-PROFIT 990 TAX FORMS ARE ALSO AVAILABLE ONLINE THROUGH A NUMBER OF WEBSITES PROVIDING COPIES OF THESE TO INTERESTED PARTIES

SCHEDULE R (Form 990)

Department of the Treasury
Internal Revenue Service

Related Organizations and Unrelated Partnerships

▶ Complete if the organization answered "Yes" on Form 990, Part IV, line 33, 34, 35b, 36, or 37.

▶ Attach to Form 990. ▶ Information about Schedule R (Form 990) and its instructions is at *www.irs.gov/form990*.

OMB No 1545-0047

2016

Open to Public Inspection

Name of the organization
MU ALPHA THETA NATL HIGH SCHOOL &
TWO-YEAR COLLEGE MATHEMATICS HONOR

Employer identification number
73-6097246

Part I **Identification of Disregarded Entities** Complete if the organization answered "Yes" on Form 990, Part IV, line 33.

(a) Name, address, and EIN (if applicable) of disregarded entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Total income	(e) End-of-year assets	(f) Direct controlling entity

Part II **Identification of Related Tax-Exempt Organizations** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related tax-exempt organizations during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Exempt Code section	(e) Public charity status (if section 501(c)(3))	(f) Direct controlling entity	(g) Section 512(b)(13) controlled entity? Yes	No
(1)MU ALPHA THETA EDUC FOUNDATION 3200 MARSHALL AVE SUITE 190 NORMAN, OK 73019 73-1506789	ED SUPPORT	OK	501 C3	7	N/A		No
(2)CHI ALPHA MU 3200 MARSHALL AVE SUITE 190 NORMAN, OK 73019 26-3471479	ED SUPPORT	OK	501 C3	7	N/A		No

Part III **Identification of Related Organizations Taxable as a Partnership** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a partnership during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Predominant income(related, unrelated, excluded from tax under sections 512-514)	(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
							Yes	No		Yes	No	

Part IV **Identification of Related Organizations Taxable as a Corporation or Trust** Complete if the organization answered "Yes" on Form 990, Part IV, line 34 because it had one or more related organizations treated as a corporation or trust during the tax year.

(a) Name, address, and EIN of related organization	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Direct controlling entity	(e) Type of entity (C corp, S corp, or trust)	(f) Share of total income	(g) Share of end-of-year assets	(h) Percentage ownership	(i) Section 512(b)(13) controlled entity?	
								Yes	No

Part V Transactions With Related Organizations Complete if the organization answered "Yes" on Form 990, Part IV, line 34, 35b, or 36.

Note. Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule		**Yes**	**No**
1 During the tax year, did the orgranization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?			
a Receipt of **(i)** interest, **(ii)** annuities, **(iii)** royalties, or **(iv)** rent from a controlled entity	**1a**		No
b Gift, grant, or capital contribution to related organization(s)	**1b**		No
c Gift, grant, or capital contribution from related organization(s)	**1c**		No
d Loans or loan guarantees to or for related organization(s)	**1d**		No
e Loans or loan guarantees by related organization(s)	**1e**		No
f Dividends from related organization(s)	**1f**		No
g Sale of assets to related organization(s)	**1g**		No
h Purchase of assets from related organization(s)	**1h**		No
i Exchange of assets with related organization(s)	**1i**		No
j Lease of facilities, equipment, or other assets to related organization(s)	**1j**		No
k Lease of facilities, equipment, or other assets from related organization(s)	**1k**		No
l Performance of services or membership or fundraising solicitations for related organization(s)	**1l**		No
m Performance of services or membership or fundraising solicitations by related organization(s)	**1m**		No
n Sharing of facilities, equipment, mailing lists, or other assets with related organization(s)	**1n**	Yes	
o Sharing of paid employees with related organization(s)	**1o**	Yes	
p Reimbursement paid to related organization(s) for expenses	**1p**		No
q Reimbursement paid by related organization(s) for expenses	**1q**	Yes	
r Other transfer of cash or property to related organization(s)	**1r**	Yes	
s Other transfer of cash or property from related organization(s)	**1s**		No

2 If the answer to any of the above is "Yes," see the instructions for information on who must complete this line, including covered relationships and transaction thresholds

(a) Name of related organization	**(b)** Transaction type (a-s)	**(c)** Amount involved	**(d)** Method of determining amount involved

Part VI **Unrelated Organizations Taxable as a Partnership** Complete if the organization answered "Yes" on Form 990, Part IV, line 37.

Provide the following information for each entity taxed as a partnership through which the organization conducted more than five percent of its activities (measured by total assets or gross revenue) that was not a related organization See instructions regarding exclusion for certain investment partnerships

(a) Name, address, and EIN of entity	(b) Primary activity	(c) Legal domicile (state or foreign country)	(d) Predominant income (related, unrelated, excluded from tax under sections 512-514)	(e) Are all partners section 501(c)(3) organizations?		(f) Share of total income	(g) Share of end-of-year assets	(h) Disproprtionate allocations?		(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)	(j) General or managing partner?		(k) Percentage ownership
				Yes	No			Yes	No		Yes	No	

Part VII Supplemental Information

Provide additional information for responses to questions on Schedule R (see instructions)

Return Reference	Explanation