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OMB No 1545-0047

Form **990****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.

Go to www.irs.gov/Form990 for instructions and the latest information.**2017****Open to Public Inspection**Department of the Treasury
Internal Revenue Service

A For the 2017 calendar year, or tax year beginning Jan 01, 2017, and ending Dec 31, 2017

B Check if applicable:

☐ Address change☐ Name change☐ Initial return☐ Final return/terminated☐ Amended return☐ Application pendingC Name of organization Society for Financial EducatioDoing business as PROFESSIONAL DEVELOPMENT INC

Number and street (or P.O. box if mail is not delivered to street address) Room/suite

700 LOCH NESS CIRCLE

City or town

State

ZIP code

FORT WASHINGTON MD 20744-

Foreign country name

Foreign province/state/county

Foreign postal code

D Employer identification number

52-6116419

E Telephone number

703-920-3807G Gross receipts \$ 575641.F Name and address of principal officer: THEODORE DANIELS700 LOCH NESS FORT WASHING MD 20744-H(a) Is this a group return for subordinates? ☐ Yes ☒ NoH(b) Are all subordinates included? ☐ Yes ☐ No

If "No," attach a list (see instructions)

I Tax-exempt status ☒ 501(c)(3) ☐ 501(c) () (Insert no.) ☐ 4947(a)(1) or ☐ 527J Website: H(c) Group exemption number K Form of organization ☒ Corporation ☐ Trust ☐ Association ☐ Other

L Year of formation

M State of legal domicile.

Part I Summary

1 Briefly describe the organization's mission or most significant activities: <u>TO ENHANCE THE FINANCIAL AND ECONOMIC LITERACY OF INDIVIDUALS AND AMERICAN HOUSEHOLDS.</u>																																			
2 Check this box <input type="checkbox"/> 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)	<u>3</u> 9																																		
4 Number of independent voting members of the governing body (Part VI, line 1b)	<u>4</u> 9																																		
5 Total number of individuals employed in calendar year 2017 (Part V, line 2a)	<u>5</u> 4																																		
6 Total number of volunteers (estimate if necessary)	<u>6</u>																																		
7a Total unrelated business revenue from Part VIII, column (C), line 12	<u>7a</u> 020219																																		
b Net unrelated business taxable income from Form 990-T, line 34	<u>7b</u>																																		
<table border="1"> <thead> <tr> <th></th> <th>Prior Year</th> <th>Current Year</th> </tr> </thead> <tbody> <tr> <td>8 Contributions and grants (Part VIII, line 1h)</td> <td>203690.</td> <td>390345.</td> </tr> <tr> <td>9 Program service revenue (Part VIII, line 2g)</td> <td>51209.</td> <td>73564.</td> </tr> <tr> <td>10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)</td> <td></td> <td></td> </tr> <tr> <td>11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)</td> <td>43460.</td> <td>111732.</td> </tr> <tr> <td>12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)</td> <td>298359.</td> <td>575641.</td> </tr> <tr> <td>13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)</td> <td>1500.</td> <td></td> </tr> <tr> <td>14 Benefits paid to or for members (Part IX, column (A), line 4)</td> <td></td> <td></td> </tr> <tr> <td>15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)</td> 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90a–90d, 91a–91d, 92a–92d, 93a–93d, 94a–94d, 95a–95d, 96a–96d, 97a–97d, 98a–98d, 99a–99d, 100a–100d, 101a–101d, 102a–102d, 103a–103d, 104a–104d, 105a–105d, 106a–106d, 107a–107d, 108a–108d, 109a–109d, 110a–110d, 111a–111d, 112a–112d, 113a–113d, 114a–114d, 115a–115d, 116a–116d, 117a–117d, 118a–118d, 119a–119d, 120a–120d, 121a–121d, 122a–122d, 123a–123d, 124a–124d, 125a–125d, 126a–126d, 127a–127d, 128a–128d, 129a–129d, 130a–130d, 131a–131d, 132a–132d, 133a–133d, 134a–134d, 135a–135d, 136a–136d, 137a–137d, 138a–138d, 139a–139d, 140a–140d, 141a–141d, 142a–142d, 143a–143d, 144a–144d, 145a–145d, 146a–146d, 147a–147d, 148a–148d, 149a–149d, 150a–150d, 151a–151d, 152a–152d, 153a–153d, 154a–154d, 155a–155d, 156a–156d, 157a–157d, 158a–158d, 159a–159d, 160a–160d, 161a–161d, 162a–162d, 163a–163d, 164a–164d, 165a–165d, 166a–166d, 167a–167d, 168a–168d, 169a–169d, 170a–170d, 171a–171d, 172a–172d, 173a–173d, 174a–174d, 175a–175d, 176a–176d, 177a–177d, 178a–178d, 179a–179d, 180a–180d, 181a–181d, 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819a–819d, 820a–820d, 821a–821d, 822a–822d, 823a–823d, 824a–824d, 825a–825d, 826a–826d, 827a–827d, 828a–828d, 829a–829d, 830a–830d, 831a–831d, 832a–832d, 833a–833d, 834a–834d, 835a–835d, 836a–836d, 837a–837d, 838a–838d, 839a–839d, 840a–840d, 841a–841d, 842a–842d, 843a–843d, 844a–844d, 845a–845d, 846a–846d, 847a–847d, 848a–848d, 849a–849d, 850a–850d, 851a–851d, 852a–852d, 853a–853d, 854a–854d, 855a–855d, 856a–856d, 857a–857d, 858a–858d, 859a–859d, 860a–860d, 861a–861d, 862a–862d, 863a–863d, 864a–864d, 865a–865d, 866a–866d, 867a–867d, 868a–868d, 869a–869d, 870a–870d, 871a–871d, 872a–872d, 873a–873d, 874a–874d, 875a–875d, 876a–876d, 877a–877d, 878a–878d, 879a–879d, 880a–880</td></tr></tbody></table>			Prior Year	Current Year	8 Contributions and grants (Part VIII, line 1h)	203690.	390345.	9 Program service revenue (Part VIII, line 2g)	51209.	73564.	10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)			11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	43460.	111732.	12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	298359.	575641.	13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	1500.		14 Benefits paid to or for members (Part IX, column (A), line 4)			15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	151270.	173390.	16a Professional fundraising fees (Part IX, column (A), line 11e)	11900.		b Total fundraising expenses (Part IX, column (D), line 25)			17 Other expenses (Part IX, column (A), lines 11a–11d, 14a–14d, 15a–15d, 16a–16d, 17a–17d, 18a–18d, 19a–19d, 20a–20d, 21a–21d, 22a–22d, 23a–23d, 24a–24d, 25a–25d, 26a–26d, 27a–27d, 28a–28d, 29a–29d, 30a–30d, 31a–31d, 32a–32d, 33a–33d, 34a–34d, 35a–35d, 36a–36d, 37a–37d, 38a–38d, 39a–39d, 40a–40d, 41a–41d, 42a–42d, 43a–43d, 44a–44d, 45a–45d, 46a–46d, 47a–47d, 48a–48d, 49a–49d, 50a–50d, 51a–51d, 52a–52d, 53a–53d, 54a–54d, 55a–55d, 56a–56d, 57a–57d, 58a–58d, 59a–59d, 60a–60d, 61a–61d, 62a–62d, 63a–63d, 64a–64d, 65a–65d, 66a–66d, 67a–67d, 68a–68d, 69a–69d, 70a–70d, 71a–71d, 72a–72d, 73a–73d, 74a–74d, 75a–75d, 76a–76d, 77a–77d, 78a–78d, 79a–79d, 80a–80d, 81a–81d, 82a–82d, 83a–83d, 84a–84d, 85a–85d, 86a–86d, 87a–87d, 88a–88d, 89a–89d, 90a–90d, 91a–91d, 92a–92d, 93a–93d, 94a–94d, 95a–95d, 96a–96d, 97a–97d, 98a–98d, 99a–99d, 100a–100d, 101a–101d, 102a–102d, 103a–103d, 104a–104d, 105a–105d, 106a–106d, 107a–107d, 108a–108d, 109a–109d, 110a–110d, 111a–111d, 112a–112d, 113a–113d, 114a–114d, 115a–115d, 116a–116d, 117a–117d, 118a–118d, 119a–119d, 120a–120d, 121a–121d, 122a–122d, 123a–123d, 124a–124d, 125a–125d, 126a–126d, 127a–127d, 128a–128d, 129a–129d, 130a–130d, 131a–131d, 132a–132d, 133a–133d, 134a–134d, 135a–135d, 136a–136d, 137a–137d, 138a–138d, 139a–139d, 140a–140d, 141a–141d, 142a–142d, 143a–143d, 144a–144d, 145a–145d, 146a–146d, 147a–147d, 148a–148d, 149a–149d, 150a–150d, 151a–151d, 152a–152d, 153a–153d, 154a–154d, 155a–155d, 156a–156d, 157a–157d, 158a–158d, 159a–159d, 160a–160d, 161a–161d, 162a–162d, 163a–163d, 164a–164d, 165a–165d, 166a–166d, 167a–167d, 168a–168d, 169a–169d, 170a–170d, 171a–171d, 172a–172d, 173a–173d, 174a–174d, 175a–175d, 176a–176d, 177a–177d, 178a–178d, 179a–179d, 180a–180d, 181a–181d, 182a–182d, 183a–183d, 184a–184d, 185a–185d, 186a–186d, 187a–187d, 188a–188d, 189a–189d, 190a–190d, 191a–191d, 192a–192d, 193a–193d, 194a–194d, 195a–195d, 196a–196d, 197a–197d, 198a–198d, 199a–199d, 200a–200d, 201a–201d, 202a–202d, 203a–203d, 204a–204d, 205a–205d, 206a–206d, 207a–207d, 208a–208d, 209a–209d, 210a–210d, 211a–211d, 212a–212d, 213a–213d, 214a–214d, 215a–215d, 216a–216d, 217a–217d, 218a–218d, 219a–219d, 220a–220d, 221a–221d, 222a–222d, 223a–223d, 224a–224d, 225a–225d, 226a–226d, 227a–227d, 228a–228d, 229a–229d, 230a–230d, 231a–231d, 232a–232d, 233a–233d, 234a–234d, 235a–235d, 236a–236d, 237a–237d, 238a–238d, 239a–239d, 240a–240d, 241a–241d, 242a–242d, 243a–243d, 244a–244d, 245a–245d, 246a–246d, 247a–247d, 248a–248d, 249a–249d, 250a–250d, 251a–251d, 252a–252d, 253a–253d, 254a–254d, 255a–255d, 256a–256d, 257a–257d, 258a–258d, 259a–259d, 260a–260d, 261a–261d, 262a–262d, 263a–263d, 264a–264d, 265a–265d, 266a–266d, 267a–267d, 268a–268d, 269a–269d, 270a–270d, 271a–271d, 272a–272d, 273a–273d, 274a–274d, 275a–275d, 276a–276d, 277a–277d, 278a–278d, 279a–279d, 280a–280d, 281a–281d, 282a–282d, 283a–283d, 284a–284d, 285a–285d, 286a–286d, 287a–287d, 288a–288d, 289a–289d, 290a–290d, 291a–291d, 292a–292d, 293a–293d, 294a–294d, 295a–295d, 296a–296d, 297a–297d, 298a–298d, 299a–299d, 300a–300d, 301a–301d, 302a–302d, 303a–303d, 304a–304d, 305a–305d, 306a–306d, 307a–307d, 308a–308d, 309a–309d, 310a–310d, 311a–311d, 312a–312d, 313a–313d, 314a–314d, 315a–315d, 316a–316d, 317a–317d, 318a–318d, 319a–319d, 320a–320d, 321a–321d, 322a–322d, 323a–323d, 324a–324d, 325a–325d, 326a–326d, 327a–327d, 328a–328d, 329a–329d, 330a–330d, 331a–331d, 332a–332d, 333a–333d, 334a–334d, 335a–335d, 336a–336d, 337a–337d, 338a–338d, 339a–339d, 340a–340d, 341a–341d, 342a–342d, 343a–343d, 344a–344d, 345a–345d, 346a–346d, 347a–347d, 348a–348d, 349a–349d, 350a–350d, 351a–351d, 352a–352d, 353a–353d, 354a–354d, 355a–355d, 356a–356d, 357a–357d, 358a–358d, 359a–359d, 360a–360d, 361a–361d, 362a–362d, 363a–363d, 364a–364d, 365a–365d, 366a–366d, 367a–367d, 368a–368d, 369a–369d, 370a–370d, 371a–371d, 372a–372d, 373a–373d, 374a–374d, 375a–375d, 376a–376d, 377a–377d, 378a–378d, 379a–379d, 380a–380d, 381a–381d, 382a–382d, 383a–383d, 384a–384d, 385a–385d, 386a–386d, 387a–387d, 388a–388d, 389a–389d, 390a–390d, 391a–391d, 392a–392d, 393a–393d, 394a–394d, 395a–395d, 396a–396d, 397a–397d, 398a–398d, 399a–399d, 400a–400d, 401a–401d, 402a–402d, 403a–403d, 404a–404d, 405a–405d, 406a–406d, 407a–407d, 408a–408d, 409a–409d, 410a–410d, 411a–411d, 412a–412d, 413a–413d, 414a–414d, 415a–415d, 416a–416d, 417a–417d, 418a–418d, 419a–419d, 420a–420d, 421a–421d, 422a–422d, 423a–423d, 424a–424d, 425a–425d, 426a–426d, 427a–427d, 428a–428d, 429a–429d, 430a–430d, 431a–431d, 432a–432d, 433a–433d, 434a–434d, 435a–435d, 436a–436d, 437a–437d, 438a–438d, 439a–439d, 440a–440d, 441a–441d, 442a–442d, 443a–443d, 444a–444d, 445a–445d, 446a–446d, 447a–447d, 448a–448d, 449a–449d, 450a–450d, 451a–451d, 452a–452d, 453a–453d, 454a–454d, 455a–455d, 456a–456d, 457a–457d, 458a–458d, 459a–459d, 460a–460d, 461a–461d, 462a–462d, 463a–463d, 464a–464d, 465a–465d, 466a–466d, 467a–467d, 468a–468d, 469a–469d, 470a–470d, 471a–471d, 472a–472d, 473a–473d, 474a–474d, 475a–475d, 476a–476d, 477a–477d, 478a–478d, 479a–479d, 480a–480d, 481a–481d, 482a–482d, 483a–483d, 484a–484d, 485a–485d, 486a–486d, 487a–487d, 488a–488d, 489a–489d, 490a–490d, 491a–491d, 492a–492d, 493a–493d, 494a–494d, 495a–495d, 496a–496d, 497a–497d, 498a–498d, 499a–499d, 500a–500d, 501a–501d, 502a–502d, 503a–503d, 504a–504d, 505a–505d, 506a–506d, 507a–507d, 508a–508d, 509a–509d, 510a–510d, 511a–511d, 512a–512d, 513a–513d, 514a–514d, 515a–515d, 516a–516d, 517a–517d, 518a–518d, 519a–519d, 520a–520d, 521a–521d, 522a–522d, 523a–523d, 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797a–797d, 798a–798d, 799a–799d, 800a–800d, 801a–801d, 802a–802d, 803a–803d, 804a–804d, 805a–805d, 806a–806d, 807a–807d, 808a–808d, 809a–809d, 810a–810d, 811a–811d, 812a–812d, 813a–813d, 814a–814d, 815a–815d, 816a–816d, 817a–817d, 818a–818d, 819a–819d, 820a–820d, 821a–821d, 822a–822d, 823a–823d, 824a–824d, 825a–825d, 826a–826d, 827a–827d, 828a–828d, 829a–829d, 830a–830d, 831a–831d, 832a–832d, 833a–833d, 834a–834d, 835a–835d, 836a–836d, 837a–837d, 838a–838d, 839a–839d, 840a–840d, 841a–841d, 842a–842d, 843a–843d, 844a–844d, 845a–845d, 846a–846d, 847a–847d, 848a–848d, 849a–849d, 850a–850d, 851a–851d, 852a–852d, 853a–853d, 854a–854d, 855a–855d, 856a–856d, 857a–857d, 858a–858d, 859a–859d, 860a–860d, 861a–861d, 862a–862d, 863a–863d, 864a–864d, 865a–865d, 866a–866d, 867a–867d, 868a–868d, 869a–869d, 870a–870d, 871a–871d, 872a–872d, 873a–873d, 874a–874d, 875a–875d, 876a–876d, 877a–877d, 878a–878d, 879a–879d, 880a–880
	Prior Year	Current Year																																	
8 Contributions and grants (Part VIII, line 1h)	203690.	390345.																																	
9 Program service revenue (Part VIII, line 2g)	51209.	73564.																																	
10 Investment income (Part VIII, column (A), lines 3, 4, and 7d)																																			
11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)	43460.	111732.																																	
12 Total revenue—add lines 8 through 11 (must equal Part VIII, column (A), line 12)	298359.	575641.																																	
13 Grants and similar amounts paid (Part IX, column (A), lines 1–3)	1500.																																		
14 Benefits paid to or for members (Part IX, column (A), line 4)																																			
15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5–10)	151270.	173390.																																	
16a Professional fundraising fees (Part IX, column (A), line 11e)	11900.																																		
b Total fundraising expenses (Part IX, column (D), line 25)																																			
17 Other expenses (Part IX, column (A), lines 11a–11d, 14a–14d, 15a–15d, 16a–16d, 17a–17d, 18a–18d, 19a–19d, 20a–20d, 21a–21d, 22a–22d, 23a–23d, 24a–24d, 25a–25d, 26a–26d, 27a–27d, 28a–28d, 29a–29d, 30a–30d, 31a–31d, 32a–32d, 33a–33d, 34a–34d, 35a–35d, 36a–36d, 37a–37d, 38a–38d, 39a–39d, 40a–40d, 41a–41d, 42a–42d, 43a–43d, 44a–44d, 45a–45d, 46a–46d, 47a–47d, 48a–48d, 49a–49d, 50a–50d, 51a–51d, 52a–52d, 53a–53d, 54a–54d, 55a–55d, 56a–56d, 57a–57d, 58a–58d, 59a–59d, 60a–60d, 61a–61d, 62a–62d, 63a–63d, 64a–64d, 65a–65d, 66a–66d, 67a–67d, 68a–68d, 69a–69d, 70a–70d, 71a–71d, 72a–72d, 73a–73d, 74a–74d, 75a–75d, 76a–76d, 77a–77d, 78a–78d, 79a–79d, 80a–80d, 81a–81d, 82a–82d, 83a–83d, 84a–84d, 85a–85d, 86a–86d, 87a–87d, 88a–88d, 89a–89d, 90a–90d, 91a–91d, 92a–92d, 93a–93d, 94a–94d, 95a–95d, 96a–96d, 97a–97d, 98a–98d, 99a–99d, 100a–100d, 101a–101d, 102a–102d, 103a–103d, 104a–104d, 105a–105d, 106a–106d, 107a–107d, 108a–108d, 109a–109d, 110a–110d, 111a–111d, 112a–112d, 113a–113d, 114a–114d, 115a–115d, 116a–116d, 117a–117d, 118a–118d, 119a–119d, 120a–120d, 121a–121d, 122a–122d, 123a–123d, 124a–124d, 125a–125d, 126a–126d, 127a–127d, 128a–128d, 129a–129d, 130a–130d, 131a–131d, 132a–132d, 133a–133d, 134a–134d, 135a–135d, 136a–136d, 137a–137d, 138a–138d, 139a–139d, 140a–140d, 141a–141d, 142a–142d, 143a–143d, 144a–144d, 145a–145d, 146a–146d, 147a–147d, 148a–148d, 149a–149d, 150a–150d, 151a–151d, 152a–152d, 153a–153d, 154a–154d, 155a–155d, 156a–156d, 157a–157d, 158a–158d, 159a–159d, 160a–160d, 161a–161d, 162a–162d, 163a–163d, 164a–164d, 165a–165d, 166a–166d, 167a–167d, 168a–168d, 169a–169d, 170a–170d, 171a–171d, 172a–172d, 173a–173d, 174a–174d, 175a–175d, 176a–176d, 177a–177d, 178a–178d, 179a–179d, 180a–180d, 181a–181d, 182a–182d, 183a–183d, 184a–184d, 185a–185d, 186a–186d, 187a–187d, 188a–188d, 189a–189d, 190a–190d, 191a–191d, 192a–192d, 193a–193d, 194a–194d, 195a–195d, 196a–196d, 197a–197d, 198a–198d, 199a–199d, 200a–200d, 201a–201d, 202a–202d, 203a–203d, 204a–204d, 205a–205d, 206a–206d, 207a–207d, 208a–208d, 209a–209d, 210a–210d, 211a–211d, 212a–212d, 213a–213d, 214a–214d, 215a–215d, 216a–216d, 217a–217d, 218a–218d, 219a–219d, 220a–220d, 221a–221d, 222a–222d, 223a–223d, 224a–224d, 225a–225d, 226a–226d, 227a–227d, 228a–228d, 229a–229d, 230a–230d, 231a–231d, 232a–232d, 233a–233d, 234a–234d, 235a–235d, 236a–236d, 237a–237d, 238a–238d, 239a–239d, 240a–240d, 241a–241d, 242a–242d, 243a–243d, 244a–244d, 245a–245d, 246a–246d, 247a–247d, 248a–248d, 249a–249d, 250a–250d, 251a–251d, 252a–252d, 253a–253d, 254a–254d, 255a–255d, 256a–256d, 257a–257d, 258a–258d, 259a–259d, 260a–260d, 261a–261d, 262a–262d, 263a–263d, 264a–264d, 265a–265d, 266a–266d, 267a–267d, 268a–268d, 269a–269d, 270a–270d, 271a–271d, 272a–272d, 273a–273d, 274a–274d, 275a–275d, 276a–276d, 277a–277d, 278a–278d, 279a–279d, 280a–280d, 281a–281d, 282a–282d, 283a–283d, 284a–284d, 285a–285d, 286a–286d, 287a–287d, 288a–288d, 289a–289d, 290a–290d, 291a–291d, 292a–292d, 293a–293d, 294a–294d, 295a–295d, 296a–296d, 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843a–843d, 844a–844d, 845a–845d, 846a–846d, 847a–847d, 848a–848d, 849a–849d, 850a–850d, 851a–851d, 852a–852d, 853a–853d, 854a–854d, 855a–855d, 856a–856d, 857a–857d, 858a–858d, 859a–859d, 860a–860d, 861a–861d, 862a–862d, 863a–863d, 864a–864d, 865a–865d, 866a–866d, 867a–867d, 868a–868d, 869a–869d, 870a–870d, 871a–871d, 872a–872d, 873a–873d, 874a–874d, 875a–875d, 876a–876d, 877a–877d, 878a–878d, 879a–879d, 880a–880																																			

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 ENHANCE THE FINANCIAL AND ECONOMIC LITERACY OF INDIVIDUALS AND AMERICAN HOUSEHOLDS.
- 2 Did the organization undertake any significant program services during the year which were not listed on the prior Form 990 or 990-F77? ☐ 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 \$ 483015 including grants of \$ 390345) (Revenue \$ 185296)
IN 2017 THE PROGRAM PROVIDED FINANCIAL AND ECONOMIC LITERACY TRAINING AND SEMINARS TO INDIVIDUALS, AMERICAN HOUSEHOLD AND MORE THAN 5,800 SSTUDENTS, ATTENDING HISTORICAL BLACK COLLEGES AND UNIVERSITIES.
- 4b (Code:) (Expenses \$ including grants of \$) (Revenue \$)
- 4c (Code:) (Expenses \$ including grants of \$) (Revenue \$)
- 4d Other program services. (Describe in Schedule O.)
(Expenses \$ including grants of \$) (Revenue \$)
- 4e Total program service expenses 483015.

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	X
2 Is the organization required to complete Schedule B, Schedule of Contributors (see instructions)?	2	X
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	X
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	X
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	X
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	X
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	X
8 Did the organization maintain collections of works of art, historical treasures, or other similar assets? If "Yes," complete Schedule D, Part III	8	X
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	X
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	X
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	X
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	X
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	X
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	X
e Did the organization report an amount for other liabilities in Part X, line 25? If "Yes," complete Schedule D, Part X	11e	X
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	X
12a Did the organization obtain separate, independent audited financial statements for the tax year? If "Yes," complete Schedule D, Parts XI and XII	12a	X
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	X
13 Is the organization a school described in section 170(b)(1)(A)(ii)? If "Yes," complete Schedule E	13	X
14a Did the organization maintain an office, employees, or agents outside of the United States?	14a	X
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	X
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	X
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	X
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	X
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	X
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	X

Part IV Checklist of Required Schedules (continued)

	Yes	No
20a Did the organization operate one or more hospital facilities? <i>If "Yes," complete Schedule H</i>		X
b If "Yes" to line 20a, did the organization attach a copy of its audited financial statements to this return?		
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? <i>If "Yes," complete Schedule I, Parts I and II</i>		X
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? <i>If "Yes," complete Schedule I, Parts I and III</i>		X
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? <i>If "Yes," complete Schedule J</i>		X
24a Did the organization have a tax-exempt bond issue with an outstanding principal amount of more than \$100,000 as of the last day of the year, that was issued after December 31, 2002? <i>If "Yes," answer lines 24b through 24d and complete Schedule K. If "No," go to line 25a</i>		X
b Did the organization invest any proceeds of tax-exempt bonds beyond a temporary period exception?		
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?		
d Did the organization act as an "on behalf of" issuer for bonds outstanding at any time during the year?		
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? <i>If "Yes," complete Schedule L, Part I</i>		X
b Is the organization aware that it engaged in an excess benefit transaction with a disqualified person in a prior year, and that the transaction has not been reported on any of the organization's prior Forms 990 or 990-EZ? <i>If "Yes," complete Schedule L, Part I</i>		X
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? <i>If "Yes," complete Schedule L, Part II</i>		X
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? <i>If "Yes," complete Schedule L, Part III</i>		X
28 Was the organization a party to a business transaction with one of the following parties (see Schedule L, Part IV instructions for applicable filing thresholds, conditions, and exceptions):		
a A current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>		X
b A family member of a current or former officer, director, trustee, or key employee? <i>If "Yes," complete Schedule L, Part IV</i>		X
c An entity of which a current or former officer, director, trustee, or key employee (or a family member thereof) was an officer, director, trustee, or direct or indirect owner? <i>If "Yes," complete Schedule L, Part IV</i>		X
29 Did the organization receive more than \$25,000 in non-cash contributions? <i>If "Yes," complete Schedule M</i>		X
30 Did the organization receive contributions of art, historical treasures, or other similar assets, or qualified conservation contributions? <i>If "Yes," complete Schedule M</i>		X
31 Did the organization liquidate, terminate, or dissolve and cease operations? <i>If "Yes," complete Schedule N, Part I</i>		X
32 Did the organization sell, exchange, dispose of, or transfer more than 25% of its net assets? <i>If "Yes," complete Schedule N, Part II</i>		X
33 Did the organization own 100% of an entity disregarded as separate from the organization under Regulations sections 301.7701-2 and 301.7701-3? <i>If "Yes," complete Schedule R, Part I</i>		X
34 Was the organization related to any tax-exempt or taxable entity? <i>If "Yes," complete Schedule R, Part II, III, or IV, and Part V, line 1</i>		X
35a Did the organization have a controlled entity within the meaning of section 512(b)(13)?		X
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)? <i>If "Yes," complete Schedule R, Part V, line 2</i>		
36 Section 501(c)(3) organizations. Did the organization make any transfers to an exempt non-charitable related organization? <i>If "Yes," complete Schedule R, Part V, line 2</i>		X
37 Did the organization conduct more than 5% of its activities through an entity that is not a related organization and that is treated as a partnership for federal income tax purposes? <i>If "Yes," complete Schedule R, Part VI</i>		X
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.		X

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.		
c	Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?	X	
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.		
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)	X	
3a	Did the organization have unrelated business gross income of \$1,000 or more during the year?		X
b	If "Yes," has it filed a Form 990-T for this year? If "No," to line 3b, provide an explanation in Schedule O.		
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)?		X
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?		X
b	Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?		X
c	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?		X
b	If "Yes," did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?		
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?		
b	If "Yes," did the organization notify the donor of the value of the goods or services provided?		
c	Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?		
d	If "Yes," indicate the number of Forms 8282 filed during the year.		
e	Did the organization receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?		
f	Did the organization, during the year, pay premiums directly or indirectly, on a personal benefit contract?		
g	If the organization received a contribution of qualified intellectual property, did the organization file Form 8899 as required?		
h	If the organization received a contribution of cars, boats, airplanes, or other vehicles, did the organization file a Form 1098-C?		
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?		X
9	Sponsoring organizations maintaining donor advised funds.		
a	Did the sponsoring organization make any taxable distributions under section 4966?		X
b	Did the sponsoring organization make a distribution to a donor, donor advisor, or related person?		X
10	Section 501(c)(7) organizations. Enter:		
a	Initiation fees and capital contributions included on Part VIII, line 12.		
b	Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities.		
11	Section 501(c)(12) organizations. Enter:		
a	Gross income from members or shareholders.		
b	Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)		
12a	Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?		X
b	If "Yes," enter the amount of tax-exempt interest received or accrued during the year.		
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.		X
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.		
c	Enter the amount of reserves on hand.		
14a	Did the organization receive any payments for indoor tanning services during the tax year?		X
b	If "Yes," has it filed a Form 720 to report these payments? If "No," provide an explanation in Schedule O.		X

Part VI Governance, Management, and Disclosure For each "Yes" response to lines 2 through 7b below, and for a "No" response to line 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. ☒ X

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 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.	9	
b	Enter the number of voting members included in line 1a, above, who are independent	9	
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	X
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	X
4	Did the organization make any significant changes to its governing documents since the prior Form 990 was filed?	4	X
5	Did the organization become aware during the year of a significant diversion of the organization's assets?	5	X
6	Did the organization have members or stockholders?	6	X
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	X
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	X
8	Did the organization contemporaneously document the meetings held or written actions undertaken during the year by the following:		
a	The governing body?	8a	X
b	Each committee with authority to act on behalf of the governing body?	8b	X
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	X

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	X
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	X
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	X
b	Were officers, directors, or trustees, and key employees required to disclose annually interests that could give rise to conflicts?	12b	X
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	X
13	Did the organization have a written whistleblower policy?	13	X
14	Did the organization have a written document retention and destruction policy?	14	X
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	X
b	Other officers or key employees of the organization	15b	X
	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	X
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

18 Section 6104 requires an organization to make its Forms 1023 (or 1024 if applicable), 990, and 990-T (Section 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:

THEODORE R DANIELS

703-920-3807

700 LOCH NESS FORT WASHINGTON MD 20744-

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, and 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) T DANIELS PRES	30			X				74100	0	0
(2) U DANIELS VP	40			X				64292	0	0
(3) M PUGH PRES OF BOARD		X						0	0	0
(4) S BINDER TREA		X						0	0	0
(5) J HOWARD SEC		X						0	0	0
(6) J RATLEY BOARD MBR		X						0	0	0
(7) B JONES BOARD MBR		X						0	0	0
(8) M WHITE BOARD MBR		X						0	0	0
(9) D ANDREWS BOARD MBR		X						0	0	0
(10) B HOWARD BOARD MBR		X						0	0	0
(11) L FOXWELL BOARD MBR		X						0	0	0
(12) P BELL BOARD MBR		X						0	0	0
(13)										
(14)										

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			
(15)										
(16)										
(17)										
(18)										
(19)										
(20)										
(21)										
(22)										
(23)										
(24)										
(25)										
1b Sub-total							138392			
c Total from continuation sheets to Part VII, Section A										
d Total (add lines 1b and 1c)							138392			

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? <i>If "Yes," complete Schedule J for such individual</i>		X
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>		X
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>		X

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 RevenueCheck 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	390345			
	g	Noncash contributions included in lines 1a-1f:	\$				
	h	Total. Add lines 1a-1f		390345			
Program Service Revenue	Business Code						
	2a	FINANCIAL CONFERANC		73564	73564		
	b						
	c						
	d						
	e						
	f	All other program service revenue					
g	Total. Add lines 2a-2f		73564				
Other Revenue	3	Investment income (including dividends, interest, and other similar amounts)					
	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)					
	d	Net rental income or (loss)					
	7a	Gross amount from sales of assets other than inventory	(i) Securities	(ii) Other			
	b	Less: cost or other basis and sales expenses					
	c	Gain or (loss)					
	d	Net gain or (loss)					
	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					
b	Less: cost of goods sold	b					
c	Net income or (loss) from sales of inventory						
Miscellaneous Revenue		Business Code					
11a	OTHER PROG REVENUE		111732	111732			
b							
c							
d	All other revenue						
e	Total. Add lines 11a-11d		111732				
12	Total revenue. See instructions		575641	185296			

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 domestic governments. See Part IV, line 21				
2	Grants and other assistance to domestic individuals. See Part IV, line 22				
3	Grants and other assistance to foreign organizations, foreign governments, and foreign individuals. See Part IV, lines 15 and 16				
4	Benefits paid to or for members				
5	Compensation of current officers, directors, trustees, and key employees	154498.	154498.		
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				
8	Pension plan accruals and contributions (include section 401(k) and 403(b) employer contributions)				
9	Other employee benefits				
10	Payroll taxes	18892.	18892.		
11	Fees for services (non-employees).				
a	Management	130405.	130405.		
b	Legal	788.	788.		
c	Accounting	2910.	2910.		
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)				
12	Advertising and promotion	10859.	10859.		
13	Office expenses	26056.		26056.	
14	Information technology	4009.		4009.	
15	Royalties				
16	Occupancy	24093.		24093.	
17	Travel	30205.	30205.		
18	Payments of travel or entertainment expenses for any federal, state, or local public officials				
19	Conferences, conventions, and meetings	48684.	48684.		
20	Interest	169.		169.	
21	Payments to affiliates				
22	Depreciation, depletion, and amortization				
23	Insurance	312.		312.	
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	OTHER EXPENSES	3748.		3748.	
b	PROGRAM ADM	1852.		1852.	
c	PROFESSIONAL SERVICES	25180.		25180.	
d	MISC	355.		355.	
e	All other expenses				
25	Total functional expenses. Add lines 1 through 24e.	483015.	397241.	85774.	
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 SheetCheck 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	126607	1	392314
	2 Savings and temporary cash investments		2	
	3 Pledges and grants receivable, net		3	
	4 Accounts receivable, net		4	
	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		8	
	9 Prepaid expenses and deferred charges		9	
	10a Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D	10a 3550		
	b Less: accumulated depreciation	10b 3550	10c	
	11 Investments—publicly traded securities		11	
	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	3863	15	3863
16 Total assets. Add lines 1 through 15 (must equal line 34)	130470	16	396177	
Liabilities	17 Accounts payable and accrued expenses	7556	17	4131
	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	6050	22	6050
	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	13606	26	10181
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		27	
	28 Temporarily restricted net assets		28	
	29 Permanently restricted net assets		29	
	Organizations that do not follow SFAS 117 (ASC958), 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	116864	33	385996
	34 Total liabilities and net assets/fund balances	130470	34	396177

Part XI Reconciliation of Net AssetsCheck 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)	575641
2	Total expenses (must equal Part IX, column (A), line 25)	483015
3	Revenue less expenses. Subtract line 2 from line 1	92626
4	Net assets or fund balances at beginning of year (must equal Part X, line 33, column (A))	116864
5	Net unrealized gains (losses) on investments	
6	Donated services and use of facilities	
7	Investment expenses	
8	Prior period adjustments	
9	Other changes in net assets or fund balances (explain in Schedule O)	
10	Net assets or fund balances at end of year. Combine lines 3 through 9 (must equal Part X, line 33, column (B))	209490

Part XII Financial Statements and ReportingCheck 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 checked="" type="checkbox"/> Cash <input 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?		X
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		
b Were the organization's financial statements audited by an independent accountant?		X
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 type="checkbox"/> Separate basis <input type="checkbox"/> Consolidated basis <input type="checkbox"/> 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?		
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?		X
b If "Yes," did the organization undergo the required audit or audits? If the organization did not undergo the required audit or audits, explain why in Schedule O and describe any steps taken to undergo such audits		

SCHEDULE A
(Form 990 or 990-EZ)

Public Charity Status and Public Support

OMB No 1545-0047

2017

Open to Public Inspection

Department of the Treasury
Internal Revenue Service

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.

▶ Go to www.irs.gov/Form990 for instructions and the latest information.

Name of the organization

Society for Financial Education &

Employer identification number

52-6116419

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 12, 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 (Form 990 or 990-EZ).)
- 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 agricultural research organization described in section 170(b)(1)(A)(ix) operated in conjunction with a land-grant college or university or a non-land-grant college of agriculture (see instructions). Enter the name, city, and state of the college or university.
- 10 ☒ 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.)
- 11 ☐ An organization organized and operated exclusively to test for public safety. See section 509(a)(4).
- 12 ☐ 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 12a through 12d that describes the type of supporting organization and complete lines 12e, 12f, and 12g.
- 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 1–10 above (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		
(A)						
(B)						
(C)						
(D)						
(E)						
Total						

Part III Support Schedule for Organizations Described in Section 509(a)(2)

(Complete only if you checked the box on line 10 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) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
1 Gifts, grants, contributions, and membership fees received. (Do not include any "unusual grants.")	242420.	700051.	697352.	203690.	390345.	2233858.
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	49585.	61889.	55641.	94669.	355587.	617371.
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	292005.	761940.	752993.	298359.	745932.	2851229.
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.)						2851229.

Section B. Total Support

Calendar year (or fiscal year beginning in)	(a) 2013	(b) 2014	(c) 2015	(d) 2016	(e) 2017	(f) Total
9 Amounts from line 6	292005.	761940.	752993.	298359.	745932.	2851229.
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.)	292005.	761940.	752993.	298359.	745932.	2851229.
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.						<input type="checkbox"/>

Section C. Computation of Public Support Percentage

15 Public support percentage for 2017 (line 8, column (f) divided by line 13, column (f)).	15	100.00%
16 Public support percentage from 2016 Schedule A, Part III, line 15.	16	0.00%

Section D. Computation of Investment Income Percentage

17 Investment income percentage for 2017 (line 10c, column (f) divided by line 13, column (f)).	17	0.00%
18 Investment income percentage from 2016 Schedule A, Part III, line 17.	18	0.00%

19a 33 1/3% support tests—2017. 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—2016. 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. ☐

SCHEDULE O
(Form 990 or 990-EZ)

Department of the Treasury
Internal Revenue Service
Name of the organization

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.
- ▶ Go to www.irs.gov/Form990 for the latest information.

OMB No 1545-0047

2017

**Open to Public
Inspection**

Employer identification number

Society for Financial Education &

52-6116419

FORM 990 PART VI LINE 11A THIS FORM IS DISTRIBUTED TO ALL

MEMBERS FOR REVIEW

FORM 990 PART VI LINE 19: FINANCIAL STATEMENTS ARE AVAILABLE

TO ALL GRANTORS. FORM 990 IS ALSO PUBLISHED IN GUIDESTAR.

PAGE 6, LINE 2.

THE PRESIDENT AND VICE PRESIDENT ARE MFAMILY MEMBERS.

PAGE 5 LINE 2a

THE PRESIDENT, VICE PRESIDENT AND TWO STAFF MEMBERS

RECEIVED W-2S

PAGE 5 LINE 1a

ALL VOTING MEMBERS ON THE BOARD ARE INDEPENDENT