Return of Organization Exempt From Income Tax

Under section 501(c), 527, or 4947(a)(1) of the Internal Revenue Code (except black lung benefit trust or private foundation)

The organization may have to use a copy of this return to satisfy state reporting requirements.

A For the 2009 calendar year, or tax year beginning and ending

B Name of organization

ACCION TEXAS, INC.

Doing Business As

2014 S. HACKBERRY ST.

SAN ANTONIO, TX 78210

C Employer Identification number

74-2712770

D Gross receipts $ 8,813,461.

E Telephone number

210-226-3664

F Name and address of principal officer:

JANIE BARRERA

2014 E. HACKBERRY ST., SAN ANTONIO, TX 78211

G Is this a group return for affiliates?

No

H Are all affiliates included?

No

I Tax-exempt status: 501(c)(3) (insert no. 4954(e)(1) or 527

J Website: WWW.ACCIONTEXAS.ORG

K Form of organization: Corporation Trust Association Other

L Year of formation: 1994 State of legal domicile: TX

Part I Summary

1 Briefly describe the organization's mission or most significant activities: ACCION TEXAS PROVIDES CREDIT TO SMALL BUSINESSES THAT DO NOT HAVE ACCESS TO LOANS FROM COMMERCIAL

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)

16

4 Number of independent voting members of the governing body (Part VI, line 1b)

16

5 Total number of employees (Part V, line 2a)

77

6 Total number of volunteers (estimate if necessary)

0

7a Total gross unrelated business revenue from Part VIII, column (C), line 12

0

7b Net unrelated business taxable income from Form 990-T, line 94

0

8 Contributions and grants (Part VIII, line 1b)

3,622,918

3,856,936

9 Program service revenue (Part VIII, line 2g)

17,827

2,792

10 Investment income (Part VIII, column (A), lines 3, 4, and 7c)

760

25,771

11 Other revenue (Part VIII, column (A), lines 5, 6d, 8c, 9c, 10c, and 11e)

7,498,441

8,813,461

12 Total revenue - add lines 8 through 11 (must equal Part VIII, column (A), line 12)

3,979,438

5,792,920

13 Grants and similar amounts paid (Part IX, column (A), lines 1-3)

2,403,093

2,723,049

14 Benefits paid to or for members (Part IX, column (A), line 4)

6,382,531

8,515,969

15 Salaries, other compensation, employee benefits (Part IX, column (A), lines 5-10)

1,115,910

297,492

16b Total fundraising expenses (Part IX, column (D), line 25)

329,343

17 Other expenses (Part IX, column (A), line 1a through 1d, 1f through 24)

19 Total expenses. Add lines 13-17 (must equal Part IX, column (A), line 25)

5,123,696

5,421,188

20 Total assets (Part X, line 16)

24,189,715

25,478,493

21 Total liabilities (Part X, line 26)

19,066,019

20,057,305

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. This declaration of preparation (other than officer) is based on all information of which preparer has any knowledge.

Preparer's signature

RINALDO J. GONZALEZ, CPA, P.C.

Preparer's signature

8700 IH-10 WEST, SUITE 505

San Antonio, Texas 78230

Preparer's name (for use only)

Preparer's EIN

2103659430

Check if self-employed

Yes

May the IRS discuss this return with the preparer shown above? (see instructions)

Yes

LHA For Privacy Act and Paperwork Reduction Act Notice, see the separate instructions.

SEE SCHEDULE O FOR ORGANIZATION MISSION STATEMENT CONTINUATION

Form 990 (2008)
Part III Statement of Program Service Accomplishments

1. Briefly describe the organization's mission:
   TO STIMULATE LOCAL ECONOMIC GROWTH AND FACILITATE LOCAL EFFORTS TO
   COMBAT POVERTY THROUGH PROVIDING CREDIT AND OTHER SUPPORT SERVICES TO
   SMALL ENTERPRISES THAT GENERALLY DO NOT HAVE ACCESS TO COMMERCIAL
   BUSINESS CREDIT.

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 exempt purpose achievements for each of the organization's three largest program services by expenses.
   Section 501(c)(3) and 501(c)(4) organizations and section 4947(a)(1) trusts are required to report the amount of grants and
   allocations to others, the total expenses, and revenue, if any, for each program service reported.

4a. (Code: ) (Expenses $ 7,487,590. Including grants of $ ) (Revenue $ )
   ACCION TEXAS PROVIDES CREDIT TO SMALL BUSINESSES THAT DO NOT HAVE
   ACCESS TO LOANS FROM COMMERCIAL SOURCES. 912 NEW LOANS WERE CLOSED IN
   THE FISCAL YEAR ENDED 12/31/2008. WITH MORE THAN $20 MILLION IN LOANS
   OUTSTANDING AS OF DECEMBER 31, 2008, ACCION TEXAS IS REGARDED AS THE
   LARGEST AND BEST PERFORMING MICROFINANCE INSTITUTION IN THE UNITED
   STATES. WITH ITS MICROLOAN MANAGEMENT SERVICES, ACCION TEXAS HELPS
   OTHER MICRO-LENDERS ACROSS THE UNITED STATES ACHIEVE ECONOMICS OF SCALE
   AND EXPAND THE REACH OF THEIR PROGRAMS. THROUGH ITS LOANS AND SERVICES,
   ACCION TEXAS HAS HELPS CREATE OR RETAIN THOUSANDS OF JOBS IN LOW TO
   MODERATE INCOME AREAS, CONTRIBUTING TO THE ECONOMIC REVITALIZATION OF
   UNDERSERVED COMMUNITIES.

4b. (Code: ) (Expenses $ ) (Revenue $ )

4c. (Code: ) (Expenses $ ) (Revenue $ )

4d. Other program services. (Describe in Schedule O.)

(Expenses $ ) (Revenue $ )

4e. Total program service expenses $ 7,487,590.
<table>
<thead>
<tr>
<th>Form 990 (2009)</th>
<th>ACCION TEXAS, INC.</th>
<th>74-2712770</th>
<th>Page 3</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Part IV: Checklist of Required Schedules</strong></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><strong>1.</strong> Is the organization described in section 501(c)(3) or 4947(a)(1) (other than a private foundation)?</td>
<td>Yes</td>
<td>No</td>
<td></td>
</tr>
<tr>
<td>If &quot;Yes,&quot; complete Schedule A</td>
<td>1</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>2.</strong> Is the organization required to complete Schedule B, Schedule of Contributors?</td>
<td>2</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>3.</strong> Did the organization engage in direct or indirect political campaign activities on behalf of or in opposition to candidates for public office? If &quot;Yes,&quot; complete Schedule C, Part I</td>
<td>3</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>4.</strong> Section 501(c)(3) organizations. Did the organization engage in lobbying activities? If &quot;Yes,&quot; complete Schedule C, Part II</td>
<td>4</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>5.</strong> Section 501(c)(4), 501(c)(6), and 501(c)(8) organizations. Is the organization subject to the section 6033(e) notice and reporting requirement and proxy tax? If &quot;Yes,&quot; complete Schedule C, Part III</td>
<td>5</td>
<td></td>
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</tr>
<tr>
<td><strong>6.</strong> Did the organization maintain any donor advised funds or any similar funds or accounts where donors have the right to provide advice on the distribution or investment of amounts in such funds or accounts? If &quot;Yes,&quot; complete Schedule D, Part I</td>
<td>6</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>7.</strong> Did the organization receive or hold a conservation easement, including easements to preserve open space, the environment, historic land areas, or historic structures? If &quot;Yes,&quot; complete Schedule D, Part II</td>
<td>7</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>8.</strong> Did the organization maintain collections of works of art, historical treasures, or other similar assets? If &quot;Yes,&quot; complete Schedule D, Part III</td>
<td>8</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>9.</strong> Did the organization report an amount in Part X, line 21; serve as a custodian for amounts not listed in Part X; or provide credit counseling, debt management, credit repair, or debt negotiation services? If &quot;Yes,&quot; complete Schedule D, Part IV</td>
<td>9</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>10.</strong> Did the organization, directly or through a related organization, hold assets in term, permanent, or quasi-endowments? If &quot;Yes,&quot; complete Schedule D, Part V</td>
<td>10</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>11.</strong> Is the organization's answer to any of the following questions &quot;Yes&quot;? If so, complete Schedule D, Parts VI, VII, VIII, IX, or X as applicable</td>
<td>11</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>- Did the organization report an amount for land, buildings, and equipment in Part X, line 10? If &quot;Yes,&quot; complete Schedule D, Part VI</td>
<td></td>
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<tr>
<td>- 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 &quot;Yes,&quot; complete Schedule D, Part VII</td>
<td></td>
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</tr>
<tr>
<td>- 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 &quot;Yes,&quot; complete Schedule D, Part VIII</td>
<td></td>
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</tr>
<tr>
<td>- 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 &quot;Yes,&quot; complete Schedule D, Part IX</td>
<td></td>
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<tr>
<td>- Did the organization report an amount for other liabilities in Part X, line 25? If &quot;Yes,&quot; complete Schedule D, Part X</td>
<td></td>
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<tr>
<td>- 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? If &quot;Yes,&quot; complete Schedule D, Part X</td>
<td></td>
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<tr>
<td><strong>12.</strong> Did the organization obtain separate, independent audited financial statements for the tax year? If &quot;Yes,&quot; complete Schedule D, Parts XI, XII, and XIII.</td>
<td>12</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>12A.</strong> Was the organization included in consolidated, independent audited financial statements for the tax year?</td>
<td>Yes</td>
<td>No</td>
<td>12A</td>
</tr>
<tr>
<td>If &quot;Yes,&quot; completing Schedule D, Parts XI, XII, and XIII is optional</td>
<td></td>
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<tr>
<td><strong>13.</strong> Is the organization a school described in section 170(b)(1)(A)(ii)? If &quot;Yes,&quot; complete Schedule E</td>
<td>13</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>14a.</strong> Did the organization maintain an office, employees, or agents outside of the United States?</td>
<td>14a</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td>b Did the organization have aggregate revenues or expenses of more than $10,000 from grants or assistance to any organization or entity located outside the United States?</td>
<td>14b</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>15.</strong> Did the organization report on Part IX, column (A), line 3, more than $5,000 of grants or assistance to any organization or entity located outside the United States? If &quot;Yes,&quot; complete Schedule F, Part I</td>
<td>15</td>
<td>X</td>
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<tr>
<td><strong>16.</strong> Did the organization report on Part IX, column (A), line 3, more than $5,000 of aggregate grants or assistance to individuals located outside the United States? If &quot;Yes,&quot; complete Schedule F, Part III</td>
<td>16</td>
<td>X</td>
<td></td>
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<tr>
<td><strong>17.</strong> 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 &quot;Yes,&quot; complete Schedule G, Part I</td>
<td>17</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>18.</strong> Did the organization report more than $15,000 total of fundraising event gross income and contributions on Part VIII, lines 1c and 8a? If &quot;Yes,&quot; complete Schedule G, Part II</td>
<td>18</td>
<td>X</td>
<td></td>
</tr>
<tr>
<td><strong>19.</strong> Did the organization report more than $15,000 of gross income from gaming activities on Part VIII, line 9a? If &quot;Yes,&quot; complete Schedule G, Part III</td>
<td>19</td>
<td>X</td>
<td></td>
</tr>
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<td><strong>20.</strong> Did the organization operate one or more hospitals? If &quot;Yes,&quot; complete Schedule H</td>
<td>20</td>
<td>X</td>
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<td>Yes</td>
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<td>37</td>
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<td>38</td>
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<td>X</td>
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</tbody>
</table>

Note: All Form 990 filers are required to complete Schedule O.
### Part V: Statements Regarding Other IRS Filings and Tax Compliance

<table>
<thead>
<tr>
<th>1a</th>
<th>Enter the number reported in Box 3 of Form 1096, Annual Summary and Transmittal of U.S. Information Returns. Enter 0 if not applicable</th>
<th>Yes</th>
<th>No</th>
<th>16</th>
</tr>
</thead>
<tbody>
<tr>
<td>1b</td>
<td>Enter the number of Forms W-2G included in line 1a. Enter 0 if not applicable</td>
<td></td>
<td></td>
<td>0</td>
</tr>
<tr>
<td>2a</td>
<td>Did the organization comply with backup withholding rules for reportable payments to vendors and reportable gaming (gambling) winnings to prize winners?</td>
<td>Yes</td>
<td>No</td>
<td>X</td>
</tr>
<tr>
<td>2b</td>
<td>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</td>
<td>Yes</td>
<td>No</td>
<td>X</td>
</tr>
<tr>
<td>3a</td>
<td>Did the organization have unrelated business gross income of $1,000 or more during the year covered by this return?</td>
<td>Yes</td>
<td>No</td>
<td>X</td>
</tr>
<tr>
<td>3b</td>
<td>If &quot;Yes,&quot; has it filed a Form 990-T for this year? If &quot;No,&quot; provide an explanation in Schedule O</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>4a</td>
<td>At any time during the calendar year, did the organization have an interest in, or a signature or authority over, a financial account in a foreign country (such as a bank account, securities account, or other financial account)?</td>
<td>Yes</td>
<td>No</td>
<td>X</td>
</tr>
<tr>
<td>4b</td>
<td>If &quot;Yes,&quot; enter the name of the foreign country. See the instructions for exceptions and filing requirements for Form TD F 90-22.1, Report of Foreign Bank and Financial Accounts</td>
<td></td>
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</tr>
<tr>
<td>5a</td>
<td>Was the organization a party to a prohibited tax shelter transaction at any time during the tax year?</td>
<td>Yes</td>
<td>No</td>
<td>X</td>
</tr>
<tr>
<td>5b</td>
<td>Did any taxable party notify the organization that it was or is a party to a prohibited tax shelter transaction?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>6a</td>
<td>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?</td>
<td>Yes</td>
<td>No</td>
<td>X</td>
</tr>
<tr>
<td>6b</td>
<td>If &quot;Yes,&quot; did the organization include with every solicitation an express statement that such contributions or gifts were not tax deductible?</td>
<td></td>
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<tr>
<td>7</td>
<td>Organizations that may receive deductible contributions under section 170(c).</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>7a</td>
<td>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?</td>
<td>Yes</td>
<td>No</td>
<td>X</td>
</tr>
<tr>
<td>7b</td>
<td>If &quot;Yes,&quot; did the organization notify the donor of the value of the goods or services provided?</td>
<td></td>
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</tr>
<tr>
<td>7c</td>
<td>Did the organization sell, exchange, or otherwise dispose of tangible personal property for which it was required to file Form 8282?</td>
<td>Yes</td>
<td>No</td>
<td>X</td>
</tr>
<tr>
<td>7d</td>
<td>If &quot;Yes,&quot; indicate the number of Forms 8282 filed during the year</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>7e</td>
<td>Did the organization, during the year, receive any funds, directly or indirectly, to pay premiums on a personal benefit contract?</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>7f</td>
<td>Did the organization, during the year, pay premiums, directly or indirectly, on a personal benefit contract?</td>
<td></td>
<td></td>
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<tr>
<td>7g</td>
<td>For all contributions of qualified intellectual property, did the organization file Form 8899 as required?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7h</td>
<td>For contributions of cars, boats, airplanes, and other vehicles, did the organization file a Form 1098-C as required?</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Sponsoring organizations maintaining donor advised funds and section 508(5)(C) supporting organizations. Did the supporting organization, or a donor advised fund maintained by a sponsoring organization, have excess business holdings at any time during the year?</td>
<td></td>
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<tr>
<td>9</td>
<td>Sponsoring organizations maintaining donor advised funds.</td>
<td></td>
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</tr>
<tr>
<td>9a</td>
<td>Did the organization make any taxable distributions under section 4966?</td>
<td></td>
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</tr>
<tr>
<td>9b</td>
<td>Did the organization make a distribution to a donor, donor advisor, or related person?</td>
<td></td>
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<tr>
<td>10</td>
<td>Section 501(c)(7) organizations. Enter:</td>
<td></td>
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</tr>
<tr>
<td>10a</td>
<td>Initiation fees and capital contributions included on Part VIII, line 12</td>
<td></td>
<td></td>
<td>16</td>
</tr>
<tr>
<td>10b</td>
<td>Gross receipts, included on Form 990, Part VIII, line 12, for public use of club facilities</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Section 501(c)(12) organizations. Enter:</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11a</td>
<td>Gross income from members or shareholders</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>11b</td>
<td>Gross income from other sources (Do not net amounts due or paid to other sources against amounts due or received from them.)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12a</td>
<td>Section 4947(a)(1) non-exempt charitable trusts. Is the organization filing Form 990 in lieu of Form 1041?</td>
<td>Yes</td>
<td>No</td>
<td>X</td>
</tr>
<tr>
<td>12b</td>
<td>If &quot;Yes,&quot; enter the amount of tax-exempt interest received or accrued during the year</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Section A. Governing Body and Management

1a Enter the number of voting members of the governing body ........................................ 16
b Enter the number of voting members that are independent ........................................ 16

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 organizational documents since the prior Form 990 was filed? 4
   [X]

5 Did the organization become aware during the year of a material diversion of the organization's assets? 5
   [X]

6 Does the organization have members or stockholders? 6
   [X]

7a Does the organization have members, stockholders, or other persons who may elect one or more members of the governing body? 7a
   [X]

b Are any decisions of the governing body subject to approval by members, stockholders, or other persons? 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.)

10a Does the organization have local chapters, branches, or affiliates? 10a
   [X]

b If "Yes," does the organization have written policies and procedures governing the activities of such chapters, affiliates, and branches to ensure their operations are consistent with those of the organization? 10b
   [X]

11 Has the organization provided a copy of this Form 990 to all members of its governing body before filing the form? 11
   [X]

11A Describe in Schedule O the process, if any, used by the organization to review this Form 990. 11A

12a Does the organization have a written conflict of interest policy? If "No," go to line 13 12a
   [X]

b Are officers, directors or trustees, and key employees required to disclose annually interests that could give rise to conflicts? 12b
   [X]

c Does the organization regularly and consistently monitor and enforce compliance with the policy? If "Yes," describe in Schedule O how this is done 12c
   [X]

13 Does the organization have a written whistleblower policy? 13
   [X]

14 Does 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? 15
   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," has the organization adopted a written policy or procedure requiring the organization to evaluate its participation in joint venture arrangements under applicable federal tax law, and taken steps to safeguard the organization's exempt status with respect to such arrangements? 16b
   [X]

Section C. Disclosure

17 List the states with which a copy of this Form 990 is required to be filed ➤ NONE

18 Section 8104 requires an organization to make its Forms 1023 or 1024 (or 1024 if applicable), 990, and 990-T (501(c)(3)s only) available for public inspection. Indicate how you make these available. Check all that apply.
   [X] Own website    [ ] Another's website    [X] Upon request

19 Describe in Schedule O whether (and if so, how), the organization makes its governing documents, conflict of interest policy, and financial statements available to the public.

20 State the name, physical address, and telephone number of the person who possesses the books and records of the organization: ➤
   GUSTAVO LASALA, - 210-226-3664
   2014 S. HACKBERRY STREET, SAN ANTONIO, TX 78210

Form 990 (2009)
932 OCC 0
02-04-10
### Part VII

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

#### 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. Use Schedule J-2 if additional space is needed.

- 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. 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 the organization did not compensate any current officer, director, or trustee.

<table>
<thead>
<tr>
<th>(A) Name and Title</th>
<th>(B) Average hours per week</th>
<th>(C) Position (check all that apply)</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>BILL ALBERS TREASURER</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>LUTHER BRANHAM VICE CHAIRMAN</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>JAY CLINGMAN, III DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>MARIO DOMINGUEZ DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>MATTHEW BOMERSBACK DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>ROSE MARY FRY CHAIRMAN</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>DAVID LONG DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>DONNA NORMANDIN DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>KENNETH OLSON CHAIRMAN</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>KATHLEEN QUIROZ SECRETARY</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>BRANDON SEALE DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>KEITH FRAZIER DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>KENNETH WILSON DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>LINDA WINSTON DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>SANDRA NANNINI DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>LAURIE VIGNAUD DIRECTOR</td>
<td>X</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>JANIE BARRERA PRESIDENT &amp; CEO</td>
<td>40.00</td>
<td>X</td>
<td>121,273.</td>
<td>0.</td>
<td>0.</td>
</tr>
</tbody>
</table>
# Part VII  Officers, Directors, Trustees, Key Employees, and Highest Compensated Employees (continued)

<table>
<thead>
<tr>
<th>(A) Name and title</th>
<th>(B) Average hours per week</th>
<th>(C) Position (check all that apply)</th>
<th>(D) Reportable compensation from the organization (W-2/1099-MISC)</th>
<th>(E) Reportable compensation from related organizations (W-2/1099-MISC)</th>
<th>(F) Estimated amount of other compensation from the organization and related organizations</th>
</tr>
</thead>
<tbody>
<tr>
<td>GARY LINDNER</td>
<td>40.00</td>
<td>X</td>
<td>94,744.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>CHIEF OPERATING OFFICER</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>GUSTAVO LASALA</td>
<td>40.00</td>
<td>X</td>
<td>90,364.</td>
<td>0.</td>
<td>0.</td>
</tr>
<tr>
<td>CHIEF FINANCIAL OFFICER</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1b Total .......................................................... ▶ 306,381. 0. 0.

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

3 Did the organization list any officer, director or trustee, key employee, or highest compensated employee on line 1a? If "Yes," complete Schedule J for such individual................. Yes

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. Yes

5 Did any person listed on line 1a receive or accrue compensation from any unrelated organization for services rendered to the organization? If "Yes," complete Schedule J for such person. Yes

---

# 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. NONE

<table>
<thead>
<tr>
<th>(A) Name and business address</th>
<th>(B) Description of services</th>
<th>(C) Compensation</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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

<table>
<thead>
<tr>
<th>Contributions, gifts, grants and other similar amounts</th>
<th>Total revenue</th>
<th>Related or exempt function revenue</th>
<th>Unrelated business revenue</th>
<th>Revenue excluded from tax under sections 512, 513, or 514</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Federated campaigns</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1b Membership dues</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1c Fundraising events</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1d Related organizations</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1e Government grants (contributions)</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1f All other contributions, gifts, and similar amounts not included above</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1g Noncash contributions included in lines 1a-1f</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1h Total Add lines 1a-1f</td>
<td>$4,430,416.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Program Service Revenue

<table>
<thead>
<tr>
<th>Program Service Revenue</th>
<th>Business Code</th>
<th>Total revenue</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>2a MICROENTERPRISE LOAN I</td>
<td>522291</td>
<td>$4,354,482</td>
<td>$4,354,482</td>
<td></td>
</tr>
</tbody>
</table>

### Investment Income (including dividends, interest, and other similar amounts)

<table>
<thead>
<tr>
<th>Investment Income (including dividends, interest, and other similar amounts)</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>3</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Income from investment of tax-exempt bond proceeds

<table>
<thead>
<tr>
<th>Income from investment of tax-exempt bond proceeds</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>4</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Royalties

<table>
<thead>
<tr>
<th>Royalties</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>5</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Gross Rents

<table>
<thead>
<tr>
<th>Gross Rents</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>6a</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Less: rental expenses

<table>
<thead>
<tr>
<th>Less: rental expenses</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>6b</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6c Rental income or (loss)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6d Net rental income or (loss)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Gross amount from sales of assets other than inventory

<table>
<thead>
<tr>
<th>Gross amount from sales of assets other than inventory</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>7a</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7b Less: cost or other basis and sales expenses</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7c Gain or (loss)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7d Net gain or (loss)</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Gross income from fundraising events (not including $ contributions reported on line 1c). See Part IV, line 18

<table>
<thead>
<tr>
<th>Gross income from fundraising events (not including $ contributions reported on line 1c). See Part IV, line 18</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>8a</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Less: direct expenses

<table>
<thead>
<tr>
<th>Less: direct expenses</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>8b</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8c Net income or (loss) from fundraising events</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Gross income from gaming activities. See Part IV, line 19

<table>
<thead>
<tr>
<th>Gross income from gaming activities. See Part IV, line 19</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>9a</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Less: direct expenses

<table>
<thead>
<tr>
<th>Less: direct expenses</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>9b</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>9c Net income or (loss) from gaming activities</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Gross sales of inventory, less returns and allowances

<table>
<thead>
<tr>
<th>Gross sales of inventory, less returns and allowances</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>10a</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Less: cost of goods sold

<table>
<thead>
<tr>
<th>Less: cost of goods sold</th>
<th>Total</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>10b</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10c Net income or (loss) from sales of inventory</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Miscellaneous Revenue

<table>
<thead>
<tr>
<th>Miscellaneous Revenue</th>
<th>Business Code</th>
<th>Total revenue</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>11a</td>
<td>522291</td>
<td>$3,804</td>
<td>$3,804</td>
<td></td>
</tr>
<tr>
<td>11b</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11c</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11d All other revenue</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11e Total Add lines 11a-11d</td>
<td></td>
<td></td>
<td>$3,804</td>
<td></td>
</tr>
</tbody>
</table>

### Total revenue. See instructions.

<table>
<thead>
<tr>
<th>Total revenue. See instructions.</th>
<th>Total revenue</th>
<th>Amount</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>12</td>
<td>$8,813,461</td>
<td>$4,383,045</td>
<td>$0</td>
</tr>
<tr>
<td></td>
<td>Do not include amounts reported on lines 6b, 7b, 8b, 9b, and 10b of Part VIII.</td>
<td>(A) Total expenses</td>
<td>Program services expenses</td>
</tr>
<tr>
<td>---</td>
<td>------------------------------------------------------------------</td>
<td>------------------</td>
<td>--------------------------</td>
</tr>
<tr>
<td>1</td>
<td>Grants and other assistance to governments and organizations in the U.S. See Part IV, line 21</td>
<td>306,381</td>
<td>92,992</td>
</tr>
<tr>
<td>2</td>
<td>Grants and other assistance to individuals in the U.S. See Part IV, line 22</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Grants and other assistance to governments, organizations, and individuals outside the U.S. See Part IV, lines 15 and 16</td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Benefits paid to or for members</td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Compensation of current officers, directors, trustees, and key employees</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Compensation not included above, to disqualified persons (as defined under section 4958(h)(1)) and persons described in section 4958(c)(3)(B)</td>
<td>1,893,405</td>
<td>1,619,357</td>
</tr>
<tr>
<td>7</td>
<td>Other salaries and wages</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Pension plan contributions (include section 401(k) and section 403(b) employer contributions)</td>
<td>347,935</td>
<td>243,729</td>
</tr>
<tr>
<td>9</td>
<td>Other employee benefits</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10</td>
<td>Payroll taxes</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Fees for services (non-employees):</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Management</td>
<td>16,076</td>
<td>8,038</td>
</tr>
<tr>
<td></td>
<td>Legal</td>
<td>27,200</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Accounting</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Lobbying</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Professional fundraising services. See Part IV, line 17</td>
<td>398,701</td>
<td>259,705</td>
</tr>
<tr>
<td></td>
<td>Investment management fees</td>
<td>23,727</td>
<td>16,457</td>
</tr>
<tr>
<td>12</td>
<td>Advertising and promotion</td>
<td>110,514</td>
<td>83,885</td>
</tr>
<tr>
<td>13</td>
<td>Office expenses</td>
<td>281,547</td>
<td>255,558</td>
</tr>
<tr>
<td>14</td>
<td>Information technology</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Royalties</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Occupancy</td>
<td>155,488</td>
<td>132,165</td>
</tr>
<tr>
<td>17</td>
<td>Travel</td>
<td>71,256</td>
<td>32,333</td>
</tr>
<tr>
<td>18</td>
<td>Payments of travel or entertainment expenses</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>for any federal, state, or local public officials</td>
<td>57,517</td>
<td>34,269</td>
</tr>
<tr>
<td>19</td>
<td>Conferences, conventions, and meetings</td>
<td>586,845</td>
<td>586,845</td>
</tr>
<tr>
<td>20</td>
<td>Interest</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21</td>
<td>Payments to affiliates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22</td>
<td>Depreciation, depletion, and amortization</td>
<td>214,612</td>
<td>182,420</td>
</tr>
<tr>
<td>23</td>
<td>Insurance</td>
<td>44,882</td>
<td>38,150</td>
</tr>
</tbody>
</table>

24 | Other expenses. Itemize expenses not covered above. (Expenses grouped together and labeled miscellaneous may not exceed 5% of total expenses shown on line 25 below.)
|   | BAD DEBT EXPENSES | 3,034,097          | 3,034,097                |                               |                    |
|   | PORTFOLIO EXPENSE | 545,945            | 545,945                  |                               |                    |
|   | EQUIPMENT RENTAL & MAIN | 118,197          | 103,094                  | 14,671                        | 432                |
|   | DUES & SUBSCRIPTIONS | 33,891           | 17,957                   | 15,721                        | 213                |
|   | SERVICE CHARGES AND FEE | 32,320         | 31,473                   | 847                           |                    |
|   | All other expenses | 40,105           | 26,687                   | 11,413                        | 2,005              |

25 | Total functional expenses. Add lines 1 through 24f | 8,515,969         | 7,487,590                 | 699,036                       | 329,343            |

26 | Joint costs. Check here □ if following SOP 88-2. Complete this line only if the organization reported in column (B) joint costs from a combined educational campaign and fundraising solicitation. |
<table>
<thead>
<tr>
<th>Assets</th>
<th>Column A</th>
<th>Column B</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Cash - non-interest-bearing</td>
<td>$1,261,200</td>
<td>$2,527,857</td>
</tr>
<tr>
<td>2. Savings and temporary cash investments</td>
<td>$442,752</td>
<td>$486,906</td>
</tr>
<tr>
<td>3. Pledges and grants receivable, net</td>
<td>$1,311,619</td>
<td>$1,103,948</td>
</tr>
<tr>
<td>4. Accounts receivable, net</td>
<td>$19,181,692</td>
<td>$18,960,560</td>
</tr>
<tr>
<td>5. Receivables from current and former officers, directors, trustees, key employees, and highest compensated employees. Complete Part II of Schedule L</td>
<td></td>
<td></td>
</tr>
<tr>
<td>6. Receivables from other disqualified persons (as defined under section 4958(f)(1)) and persons described in section 4958(c)(3)(B). Complete Part II of Schedule L</td>
<td></td>
<td></td>
</tr>
<tr>
<td>7. Notes and loans receivable, net</td>
<td></td>
<td></td>
</tr>
<tr>
<td>8. Inventories for sale or use</td>
<td></td>
<td></td>
</tr>
<tr>
<td>9. Prepaid expenses and deferred charges</td>
<td></td>
<td></td>
</tr>
<tr>
<td>10a. Land, buildings, and equipment: cost or other basis. Complete Part VI of Schedule D</td>
<td>$2,914,524</td>
<td>$1,689,971</td>
</tr>
<tr>
<td>10b. Less: accumulated depreciation</td>
<td>$910,253</td>
<td>$2,004,271</td>
</tr>
<tr>
<td>11. Investments - publicly traded securities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>12. Investments - other securities. See Part IV, line 11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>13. Investments - program-related. See Part IV, line 11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>14. Intangible assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>15. Other assets. See Part IV, line 11</td>
<td></td>
<td></td>
</tr>
<tr>
<td>16. Total assets. Add lines 1 through 15 (must equal line 34)</td>
<td>$24,189,715</td>
<td>$25,478,493</td>
</tr>
<tr>
<td>Liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>17. Accounts payable and accrued expenses</td>
<td></td>
<td></td>
</tr>
<tr>
<td>18. Grants payable</td>
<td></td>
<td></td>
</tr>
<tr>
<td>19. Deferred revenue</td>
<td></td>
<td></td>
</tr>
<tr>
<td>20. Tax-exempt bond liabilities</td>
<td></td>
<td></td>
</tr>
<tr>
<td>21. Escrow or custodial account liability. Complete Part IV of Schedule D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>22. Payables to current and former officers, directors, trustees, key employees, highest compensated employees, and disqualified persons. Complete Part II of Schedule L</td>
<td></td>
<td></td>
</tr>
<tr>
<td>23. Secured mortgages and notes payable to unrelated third parties</td>
<td></td>
<td></td>
</tr>
<tr>
<td>24. Unsecured notes and loans payable to unrelated third parties</td>
<td></td>
<td></td>
</tr>
<tr>
<td>25. Other liabilities. Complete Part X of Schedule D</td>
<td></td>
<td></td>
</tr>
<tr>
<td>26. Total liabilities. Add lines 17 through 25</td>
<td>$612,300</td>
<td>$709,879</td>
</tr>
<tr>
<td>Net Assets or Fund Balances</td>
<td></td>
<td></td>
</tr>
<tr>
<td>27. Unrestricted net assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>28. Temporarily restricted net assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>29. Permanently restricted net assets</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Organizations that do not follow SFAS 117, check here and complete lines 30 through 34.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>30. Capital stock or trust principal, or current funds</td>
<td></td>
<td></td>
</tr>
<tr>
<td>31. Paid-in or capital surplus, or land, building, or equipment fund</td>
<td></td>
<td></td>
</tr>
<tr>
<td>32. Retained earnings, endowment, accumulated income, or other funds</td>
<td></td>
<td></td>
</tr>
<tr>
<td>33. Total net assets or fund balances</td>
<td>$5,123,696</td>
<td>$5,421,188</td>
</tr>
<tr>
<td>34. Total liabilities and net assets/fund balances</td>
<td>$24,189,715</td>
<td>$25,478,493</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Yes</td>
</tr>
<tr>
<td>---</td>
<td>---</td>
<td>-----</td>
</tr>
<tr>
<td>1</td>
<td>Accounting method used to prepare the Form 990:</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>□ Cash</td>
</tr>
<tr>
<td></td>
<td>If the organization changed its method of accounting from a prior year or checked &quot;Other,&quot; explain in Schedule O.</td>
<td></td>
</tr>
<tr>
<td>2a</td>
<td>Were the organization's financial statements compiled or reviewed by an independent accountant?</td>
<td></td>
</tr>
<tr>
<td>2b</td>
<td>Were the organization's financial statements audited by an independent accountant?</td>
<td></td>
</tr>
<tr>
<td>2c</td>
<td>If &quot;Yes&quot; 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?</td>
<td></td>
</tr>
<tr>
<td>3a</td>
<td>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?</td>
<td>X</td>
</tr>
<tr>
<td>3b</td>
<td>If &quot;Yes,&quot; 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.</td>
<td>X</td>
</tr>
</tbody>
</table>

Form 990 (2009)
Name of the organization: ACCION TEXAS, INC.

Reason for Public Charity Status:
1. A church, convention of churches, or association of churches described in section 170(b)(1)(A)(i).
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).
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).
9. An organization that normally receives: (1) more than 33 1/3% of its support from contributions, membership fees, and gross receipts from activities related to its exempt functions, subject to certain exceptions; or (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).
10. An organization organized and operated exclusively to test for public safety. See section 509(a)(4).
11. An organization organized and operated exclusively for the benefit of, 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).

Type of Supporting Organization:
- Type I
- Type II
- Type III - Functionally Integrated
- Type III - Other

Supporting Organization:
By checking this box, I certify that the organization is not controlled directly or indirectly by one or more disqualified persons other than foundation managers and other than one or more publicly supported organizations described in section 509(a)(1) or section 509(a)(2).

August 17, 2008, has the organization accepted any gift or contribution from any of the following persons?
- (i) A person who directly or indirectly controls, either alone or together with persons described in (ii) and (iii) below, the governing body of the supported organization.
- (ii) A family member of a person described in (i) above.
- (iii) A 35% controlled entity of a person described in (i) or (ii) above.

Amount of Support:

<table>
<thead>
<tr>
<th>Name of Supported Organization</th>
<th>EIN</th>
<th>Type of Organization</th>
<th>Type of Supporting Organization</th>
<th>Is the Organization Listed in Your Governing Document?</th>
<th>Did You Notify the Organization in Col. (i) of Your Support?</th>
<th>Is the Organization in Col. (i) Organized in the U.S.?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Yes</td>
<td>No</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Total

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990 or 990-EZ.
## Section A. Public Support

**Calendar year (or fiscal year beginning in):**

<table>
<thead>
<tr>
<th></th>
<th>(a) 2005</th>
<th>(b) 2006</th>
<th>(c) 2007</th>
<th>(d) 2008</th>
<th>(e) 2009</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Gifts, grants, contributions, and membership fees received. (Do not include any &quot;usual grants.&quot;)</td>
<td>2492710.</td>
<td>2349103.</td>
<td>2344677.</td>
<td>3622918.</td>
<td>4430416.</td>
</tr>
<tr>
<td>2</td>
<td>Tax revenues levied for the organization's benefit and either paid to or expended on its behalf</td>
<td>2492710.</td>
<td>2349103.</td>
<td>2344677.</td>
<td>3622918.</td>
<td>4430416.</td>
</tr>
<tr>
<td>3</td>
<td>The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td>2492710.</td>
<td>2349103.</td>
<td>2344677.</td>
<td>3622918.</td>
<td>4430416.</td>
</tr>
<tr>
<td>4</td>
<td>Total. Add lines 1 through 3</td>
<td>2492710.</td>
<td>2349103.</td>
<td>2344677.</td>
<td>3622918.</td>
<td>4430416.</td>
</tr>
<tr>
<td>5</td>
<td>The portion of total contributions by each person (other than a governmental unit or publicly supported organization) included on line 1 that exceeds 2% of the amount shown on line 11, column (f)</td>
<td>2492710.</td>
<td>2349103.</td>
<td>2344677.</td>
<td>3622918.</td>
<td>4430416.</td>
</tr>
</tbody>
</table>

**Total Support. Subject line 5 from line 4.**

---

## Section B. Total Support

**Calendar year (or fiscal year beginning in):**

<table>
<thead>
<tr>
<th></th>
<th>(a) 2005</th>
<th>(b) 2006</th>
<th>(c) 2007</th>
<th>(d) 2008</th>
<th>(e) 2009</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>7</td>
<td>Amounts from line 4</td>
<td>2492710.</td>
<td>2349103.</td>
<td>2344677.</td>
<td>3622918.</td>
<td>4430416.</td>
</tr>
<tr>
<td>8</td>
<td>Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources</td>
<td>29,833.</td>
<td>40,033.</td>
<td>27,914.</td>
<td>17,827.</td>
<td>2,792.</td>
</tr>
<tr>
<td>9</td>
<td>Net income from unrelated business activities, whether or not the business is regularly carried on</td>
<td>2492710.</td>
<td>2349103.</td>
<td>2344677.</td>
<td>3622918.</td>
<td>4430416.</td>
</tr>
<tr>
<td>10</td>
<td>Other income. Do not include gain or loss from the sale of capital assets (Explain in Part IV.)</td>
<td>2492710.</td>
<td>2349103.</td>
<td>2344677.</td>
<td>3622918.</td>
<td>4430416.</td>
</tr>
<tr>
<td>11</td>
<td>Total support. Add lines 7 through 10</td>
<td>2492710.</td>
<td>2349103.</td>
<td>2344677.</td>
<td>3622918.</td>
<td>4430416.</td>
</tr>
<tr>
<td>12</td>
<td>Gross receipts from related activities, etc. (see instructions)</td>
<td>2492710.</td>
<td>2349103.</td>
<td>2344677.</td>
<td>3622918.</td>
<td>4430416.</td>
</tr>
<tr>
<td>13</td>
<td>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.</td>
<td>15358223.</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Section C. Computation of Public Support Percentage**

<p>| | | | | | | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>14</td>
<td>Public support percentage for 2009 (line 6, column (f) divided by line 11, column (f))</td>
<td>99.23%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>15</td>
<td>Public support percentage from 2008 Schedule A, Part II, line 14</td>
<td>98.99%</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

**Schedule A (Form 990 or 990-EZ) 2009**

32023
02-08-10
### Section A. Public Support

**Calendar year (or fiscal year beginning in):**

<table>
<thead>
<tr>
<th></th>
<th>(a) 2005</th>
<th>(b) 2006</th>
<th>(c) 2007</th>
<th>(d) 2008</th>
<th>(e) 2009</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Gifts, grants, contributions, and membership fees received. (Do not include any &quot;unusual grants.&quot;)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Gross receipt from activities that are not an unrelated trade or business under section 513</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Tax revenues levied for the organization's benefit and either paid to or expended on its behalf</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>The value of services or facilities furnished by a governmental unit to the organization without charge</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Total. Add lines 1 through 5</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7a</td>
<td>Amounts included on lines 1, 2, and 3 received from disqualified persons</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>7b</td>
<td>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 10 for the year</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Public support (Add line 6 and line 7)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section B. Total Support

**Calendar year (or fiscal year beginning in):**

<table>
<thead>
<tr>
<th></th>
<th>(a) 2005</th>
<th>(b) 2006</th>
<th>(c) 2007</th>
<th>(d) 2008</th>
<th>(e) 2009</th>
<th>(f) Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>9</td>
<td>Amounts from line 6</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10a</td>
<td>Gross income from interest, dividends, payments received on securities loans, rents, royalties and income from similar sources</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>10b</td>
<td>Unrelated business taxable income (less section 511 taxes) from businesses acquired after June 30, 1975</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11</td>
<td>Net income from unrelated business activities not included in line 10b, whether or not the business is regularly carried on</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>12</td>
<td>Other income. Do not include gain or loss from the sale of capital assets. (Explain in Part IV)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>13</td>
<td>Total support (Add lines 9, 10a, 10b, 11, and 12)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>14</td>
<td>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</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Section C. Computation of Public Support Percentage

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>15</td>
<td>Public support percentage for 2009 (line 8, column (f) divided by line 13, column (f))</td>
</tr>
<tr>
<td>16</td>
<td>Public support percentage from 2008 Schedule A, Part III, line 15</td>
</tr>
</tbody>
</table>

### Section D. Computation of Investment Income Percentage

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>17</td>
<td>Investment income percentage for 2009 (line 10c, column (f) divided by line 13, column (f))</td>
</tr>
<tr>
<td>18</td>
<td>Investment income percentage from 2008 Schedule A, Part III, line 17</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th></th>
<th>%</th>
</tr>
</thead>
<tbody>
<tr>
<td>19a</td>
<td>33 1/3% support tests - 2009. 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</td>
</tr>
<tr>
<td>19b</td>
<td>33 1/3% support tests - 2008. 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</td>
</tr>
<tr>
<td>20</td>
<td>Private foundation. If the organization did not check a box on line 14, 19a, or 19b, check this box and see instructions</td>
</tr>
</tbody>
</table>
Schedule of Contributors

▶ Attach to Form 990, 990-EZ, or 990-PF.

Name of the organization

ACCIÓN TEXAS, INC.

Employer identification number
74-2712770

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 501(c)(3) (enter number) organization

☐ 4947(a)(1) nonexempt charitable trust not treated as a private foundation

☐ 527 political organization

Form 990-PF

☐ 501(c)(3) exempt private foundation

☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation

☐ 501(c)(3) taxable private foundation

Check if your organization is covered by the General Rule or a Special Rule.

Note. Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.

General Rule

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

Special Rules

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

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

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

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

LHA For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990, 990-EZ, or 990-PF.

Schedule B (Form 990, 990-EZ, or 990-PF) (2669)
<table>
<thead>
<tr>
<th>No.</th>
<th>Name, address, and ZIP + 4</th>
<th>Aggregate contributions</th>
<th>Type of contribution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Citi Foundation</td>
<td>$150,000</td>
<td>Person X</td>
</tr>
<tr>
<td></td>
<td>850 3rd Ave</td>
<td></td>
<td>Payroll No</td>
</tr>
<tr>
<td></td>
<td>New York, NY 10022</td>
<td></td>
<td>Noncash No</td>
</tr>
</tbody>
</table>

(Complete Part II if there is a noncash contribution.)
# Schedule D (Form 990) 2009
## Supplemental Financial Statements

<table>
<thead>
<tr>
<th>Part I: Organizations Maintaining Donor Advised Funds or Other Similar Funds or Accounts. Complete if the organization answered &quot;Yes&quot; to Form 990, Part IV, line 6.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Total number at end of year</td>
</tr>
<tr>
<td>2 Aggregate contributions to (during year)</td>
</tr>
<tr>
<td>3 Aggregate grants from (during year)</td>
</tr>
<tr>
<td>4 Aggregate value at end of year</td>
</tr>
<tr>
<td>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?</td>
</tr>
<tr>
<td>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?</td>
</tr>
</tbody>
</table>

### (a) Donor advised funds | (b) Funds and other accounts

<table>
<thead>
<tr>
<th>Part II: Conservation Easements. Complete if the organization answered &quot;Yes&quot; to Form 990, Part IV, line 7.</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Purpose(s) of conservation easements held by the organization (check all that apply).</td>
</tr>
<tr>
<td>☐ Preservation of land for public use (e.g., recreation or pleasure)</td>
</tr>
<tr>
<td>☐ Protection of natural habitat</td>
</tr>
<tr>
<td>☐ Preservation of open space</td>
</tr>
<tr>
<td>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.</td>
</tr>
<tr>
<td>a Total number of conservation easements</td>
</tr>
<tr>
<td>b Total acreage restricted by conservation easements</td>
</tr>
<tr>
<td>c Number of conservation easements on a certified historic structure included in (a)</td>
</tr>
<tr>
<td>d Number of conservation easements included in (c) acquired after 8/17/06</td>
</tr>
<tr>
<td>3 Number of conservation easements modified, transferred, released, extinguished, or terminated by the organization during the tax year</td>
</tr>
<tr>
<td>4 Number of states where property subject to conservation easement is located</td>
</tr>
<tr>
<td>5 Does the organization have a written policy regarding the periodic monitoring, inspection, handling of violations, and enforcement of the conservation easements it holds?</td>
</tr>
<tr>
<td>6 Staff and volunteer hours devoted to monitoring, inspecting, and enforcing conservation easements during the year</td>
</tr>
<tr>
<td>7 Amount of expenses incurred in monitoring, inspecting, and enforcing conservation easements during the year</td>
</tr>
<tr>
<td>8 Does each conservation easement reported on line 2(d) above satisfy the requirements of section 170(h)(4)(B)(ii) and section 170(h)(4)(B)(iii)?</td>
</tr>
<tr>
<td>9 In Part XIV, describe how the organization reports conservation easements in its revenue and expense statement, and balance sheet, and include, if applicable, the text of the footnote to the organization's financial statements that describes the organization's accounting for conservation easements.</td>
</tr>
</tbody>
</table>

### Part III: Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets. Complete if the organization answered "Yes" to Form 990, Part IV, line 8. |

| a If the organization elected, as permitted under SFAS 116, not to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide, in Part XIV, the text of the footnote to its financial statements that describes these items. |
| b If the organization elected, as permitted under SFAS 116, to report in its revenue statement and balance sheet works of art, historical treasures, or other similar assets held for public exhibition, education, or research in furtherance of public service, provide the following amounts relating to these items: |
| (i) Revenues included in Form 990, Part VIII, line 1 |
| (ii) Assets included in Form 990, Part X |
| 2 If the organization received or held works of art, historical treasures, or other similar assets for financial gain, provide the following amounts required to be reported under SFAS 116 relating to these items: |
| a Revenues included in Form 990, Part VIII, line 1 |
| b Assets included in Form 990, Part X |
Part III. Organizations Maintaining Collections of Art, Historical Treasures, or Other Similar Assets (continued)

3 Using the organization's acquisition, accession, and other records, check any of the following that are a significant use of its collection items (check all that apply):
   a Public exhibition
   b Scholarly research
   c Preservation for future generations
   d Loan or exchange programs
e Other

4 Provide a description of the organization's collections and explain how they further the organization's exempt purpose in Part XIV.

5 During the year, did the organization solicit or receive donations of art, historical treasures, or other similar assets to be sold to raise funds rather than to be maintained as part of the organization's collection? Yes No

Part IV. Escrow and Custodial Arrangements. Complete if organization answered "Yes" to Form 990, Part IV, line 8, 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

1b If "Yes," explain the arrangement in Part XIV and complete the following table:

<table>
<thead>
<tr>
<th>1c</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1d Beginning balance
1e Additions during the year
1f Distributions during the year
1g Ending balance

2a Did the organization include an amount on Form 990, Part X, line 21? Yes No

2b If "Yes," explain the arrangement in Part XIV.

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

1a Beginning of year balance
1b Contributions
1c Net Investment earnings, gains, and losses
1d Grants or scholarships
1e Other expenditures for facilities and programs
1f Administrative expenses
1g End of year balance

<table>
<thead>
<tr>
<th>(a) Current year</th>
<th>(b) Prior year</th>
<th>(c) Two years back</th>
<th>(d) Three years back</th>
<th>(e) Four years back</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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<tr>
<td></td>
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<td></td>
</tr>
</tbody>
</table>

2 Provide the estimated percentage of the year end balance held as:
   a Board designated or quasi-endowment %
   b Permanent endowment %
   c Term endowment %

3a Are there endowment funds not in the possession of the organization that are held and administered for the organization by:
   (i) unrelated organizations
   (ii) related organizations

3a(i) Yes No
3a(ii) Yes No

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

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

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

<table>
<thead>
<tr>
<th>Description of investment</th>
<th>(a) Cost or other basis (investment)</th>
<th>(b) Cost or other basis (other)</th>
<th>(e) Accumulated depreciation</th>
<th>(d) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td>1a Land</td>
<td>250,000</td>
<td></td>
<td></td>
<td>250,000</td>
</tr>
<tr>
<td>1b Buildings</td>
<td>1,734,546</td>
<td></td>
<td>231,999</td>
<td>1,502,547</td>
</tr>
<tr>
<td>1c Leasehold improvements</td>
<td></td>
<td></td>
<td>678,254</td>
<td>251,724</td>
</tr>
<tr>
<td>1d Equipment</td>
<td>929,978</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>1e Other</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Total. Add lines 1a through 1e. (Column (d) must equal Form 990, Part X, column (B), line 10(c)). 2,004,271
**Part VII: Investments - Other Securities.** See Form 990, Part X, line 12.

<table>
<thead>
<tr>
<th>(a) Description of security or category (including name of security)</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Financial derivatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Closely-held equity interests</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Other</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total. (Col (b) must equal Form 990, Part X, col (B) line 12.)**

**Part VIII: Investments - Program Related.** See Form 990, Part X, line 13.

<table>
<thead>
<tr>
<th>(a) Description of investment type</th>
<th>(b) Book value</th>
<th>(c) Method of valuation: Cost or end-of-year market value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total. (Col (b) must equal Form 990, Part X, col (B) line 13.)**

**Part IX: Other Assets.** See Form 990, Part X, line 15.

<table>
<thead>
<tr>
<th>(a) Description</th>
<th>(b) Book value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Total. (Column (b) must equal Form 990, Part X, col (B) line 15.)**

**Part X: Other Liabilities.** See Form 990, Part X, line 25.

<table>
<thead>
<tr>
<th>(a) Description of liability</th>
<th>(b) Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>Federal income taxes</td>
<td></td>
</tr>
<tr>
<td>TEXAS CAPITAL ACCESS FUND RESERVE</td>
<td>26,265.</td>
</tr>
<tr>
<td>EQUITY EQUIVALENTS</td>
<td>2,500,000.</td>
</tr>
<tr>
<td>DEFERRED REVENUE</td>
<td>34,372.</td>
</tr>
</tbody>
</table>

**Total. (Column (b) must equal Form 990, Part X, col (B) line 25.)** 2,560,637.

2. FIN 48 Footnote: In Part XIV, 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.
### Part XI: Reconciliation of Change in Net Assets from Form 990 to Audited Financial Statements

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue (Form 990, Part VIII, column A, line 12)</td>
<td>8,813,461</td>
</tr>
<tr>
<td>2</td>
<td>Total expenses (Form 990, Part IX, column A, line 25)</td>
<td>8,515,969</td>
</tr>
<tr>
<td>3</td>
<td>Excess or (deficit) for the year. Subtract line 2 from line 1</td>
<td></td>
</tr>
<tr>
<td>4</td>
<td>Net unrealized gains (losses) on investments</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Donated services and use of facilities</td>
<td></td>
</tr>
<tr>
<td>6</td>
<td>Investment expenses</td>
<td></td>
</tr>
<tr>
<td>7</td>
<td>Prior period adjustments</td>
<td></td>
</tr>
<tr>
<td>8</td>
<td>Other (Describe in Part XIV)</td>
<td></td>
</tr>
<tr>
<td>9</td>
<td>Total adjustments (net). Add lines 4 through 8</td>
<td>0</td>
</tr>
<tr>
<td>10</td>
<td>Excess or (deficit) for the year per audited financial statements. Combine lines 3 and 9</td>
<td>297,492</td>
</tr>
</tbody>
</table>

### Part XII: Reconciliation of Revenue per Audited Financial Statements With Revenue per Return

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total revenue, gains, and other support per audited financial statements</td>
<td>8,875,588</td>
</tr>
<tr>
<td>2</td>
<td>Amounts included on line 1 but not on Form 990, Part VIII, line 12:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a. Net unrealized gains on investments</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Donated services and use of facilities</td>
<td>62,127</td>
</tr>
<tr>
<td></td>
<td>c. Recoveries of prior year grants</td>
<td></td>
</tr>
<tr>
<td></td>
<td>d. Other (Describe in Part XIV)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>e. Add lines 2a through 2d</td>
<td>62,127</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1</td>
<td>8,813,461</td>
</tr>
<tr>
<td>4</td>
<td>Amounts included on Form 990, Part VIII, line 12, but not on line 1:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a. Investment expenses not included on Form 990, Part VIII, line 7b</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Other (Describe in Part XIV)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Add lines 4a and 4b</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Total revenue. Add lines 3 and 4e. (This must equal Form 990, Part I, line 12)</td>
<td>8,813,461</td>
</tr>
</tbody>
</table>

### Part XIII: Reconciliation of Expenses per Audited Financial Statements With Expenses per Return

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
<th>Amount</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Total expenses and losses per audited financial statements</td>
<td>8,578,096</td>
</tr>
<tr>
<td>2</td>
<td>Amounts included on line 1 but not on Form 990, Part IX, line 25:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a. Donated services and use of facilities</td>
<td>62,127</td>
</tr>
<tr>
<td></td>
<td>b. Prior year adjustments</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Other losses</td>
<td></td>
</tr>
<tr>
<td></td>
<td>d. Other (Describe in Part XIV)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>e. Add lines 2a through 2d</td>
<td>62,127</td>
</tr>
<tr>
<td>3</td>
<td>Subtract line 2e from line 1</td>
<td>8,515,969</td>
</tr>
<tr>
<td>4</td>
<td>Amounts included on Form 990, Part IX, line 25, but not on line 1:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>a. Investment expenses not included on Form 990, Part VIII, line 7b</td>
<td></td>
</tr>
<tr>
<td></td>
<td>b. Other (Describe in Part XIV)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>c. Add lines 4a and 4b</td>
<td></td>
</tr>
<tr>
<td>5</td>
<td>Total expenses. Add lines 3 and 4e. (This must equal Form 990, Part I, line 18)</td>
<td>8,515,969</td>
</tr>
</tbody>
</table>

### Part XIV: Supplemental Information

Complete this part to provide the descriptions required for Part II, lines 3, 5, and 9; Part III, lines 1a and 4; Part IV, lines 1b and 2b; Part V, line 4; Part X, line 2; Part XI, line 8; Part XII, lines 2d and 4b; and Part XIII, lines 2d and 4b. Also complete this part to provide any additional information.
Supplemental Information to Form 990

Complete to provide information for responses to specific questions on Form 990 or to provide any additional information. 
Attach to Form 990.

Name of the organization

ACCION TEXAS, INC.

Form 990, Part I, Line 1, Description of Organization Mission:
Sources. Through its loans and services, ACCION Texas helps micro entrepreneurs throughout Texas strengthen their businesses, stabilize and increase their incomes, create additional employment and contribute to the economic revitalization of their communities.

Form 990, Part VI, Section A, Line 8B: There are no committees with authority to act on behalf of the governing body.

Form 990, Part VI, Section B, Line 11: The Form 990 is e-mailed to each director prior to filing for their review and approval.

Form 990, Part VI, Section B, Line 12C: The members of the board annually signs statements of non-conFLICT OF INTEREST.

Form 990, Part VI, Section B, Line 15A: The board of directors annually reviews and approves compensation.

Form 990, Part VI, Section C, Line 19: ACCION Texas makes its governing documents available by request and by guidestar.

LHA For Privacy Act and Paperwork Reduction Act Notice, see the instructions for Form 990.
**Schedule R**

**Related Organizations and Unrelated Partnerships**

- Complete if the organization answered "Yes" to Form 990, Part IV, line 33, 34, 35, 36, or 37.
- Attach to Form 990.
- See separate instructions.

**Part I**

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

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of disregarded entity</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Total income</th>
<th>(e) End-of-year assets</th>
<th>(f) Direct controlling entity</th>
</tr>
</thead>
<tbody>
<tr>
<td>AT MICROLOANS I LLC - 74-2712770</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>2014 S. HANCEBERRY</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>SAN ANTONIO, TX 78210</td>
<td>SMALL BUSINESS MICROLOANS</td>
<td>TEXAS</td>
<td>0</td>
<td>0</td>
<td>N/A</td>
</tr>
</tbody>
</table>

**Part II**

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

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of related organization</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Exempt Code section</th>
<th>(e) Public charity status (if section 501(c)(3))</th>
<th>(f) Direct controlling entity</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</tr>
</tbody>
</table>

**LHA** For Privacy Act and Paperwork Reduction Act Notice, see the Instructions for Form 990.

Schedule R (Form 990) 2009
### Part III: Identification of Related Organizations Taxable as a Partnership

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of related organization</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Direct controlling entity</th>
<th>(e) Predominant income (related, unrelated, excluded from tax under sections 512-514)</th>
<th>(f) Share of total income</th>
<th>(g) Share of end-of-year assets</th>
<th>(h) Disproportionate allocations?</th>
<th>(i) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)</th>
<th>(i) General or managing partner?</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
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</table>

### Part IV: Identification of Related Organizations Taxable as a Corporation or Trust

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of related organization</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Direct controlling entity</th>
<th>(e) Type of entity (C corp, S corp, or trust)</th>
<th>(f) Share of total income</th>
<th>(g) Share of end-of-year assets</th>
<th>(h) Percentage ownership</th>
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## Part V. Transactions With Related Organizations

(Complete if the organization answered 'Yes' to Form 990, Part IV, line 34, 35, or 36.)

### Note.
Complete line 1 if any entity is listed in Parts II, III, or IV of this schedule.

1. **During the tax year, did the organization engage in any of the following transactions with one or more related organizations listed in Parts II-IV?**

<table>
<thead>
<tr>
<th>(a)</th>
<th>(b)</th>
<th>(c)</th>
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<tbody>
<tr>
<td>1a</td>
<td>Yes</td>
<td>No</td>
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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.**

<table>
<thead>
<tr>
<th>(a)</th>
<th>(b) Transaction type (art)</th>
<th>(c) Amount involved</th>
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</table>
Part VI: Unrelated Organizations Taxable as a Partnership (Complete if the organization answered "Yes" to 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.

<table>
<thead>
<tr>
<th>(a) Name, address, and EIN of entity</th>
<th>(b) Primary activity</th>
<th>(c) Legal domicile (state or foreign country)</th>
<th>(d) Are all partner section 501(c)(9) organizations?</th>
<th>(e) Share of end-of-year assets</th>
<th>(f) Disproportionate allocations?</th>
<th>(g) Code V-UBI amount in box 20 of Schedule K-1 (Form 1065)</th>
<th>(h) General or managing partner</th>
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<td>Yes No</td>
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Schedule R (Form 990) 2009
Application for Extension of Time To File an Exempt Organization Return

File a separate application for each return.

- if you are filing for an Automatic 3-Month Extension, complete only Part I and check this box .................................................. 
- if you are filing for an Additional (Not Automatic) 3-Month Extension, complete only Part II (on page 2 of this form).

Do not complete Part II unless you have already been granted an automatic 3-month extension on a previously filed Form 8868.

**Part I. Automatic 3-Month Extension of Time.** Only submit original (no copies needed).

A corporation required to file Form 990-T and requesting an automatic 6-month extension for check this box and complete

Part I only .................................................................................................................................................................................

All other corporations (including 1120-C filers), partnerships, REMICs, and trusts must use Form 7004 to request an extension of time to file income tax returns.

Electronic Filing (e-file). Generally, you can electronically file Form 8868 if you want a 3-month automatic extension of time to file one of the returns noted below (6 months for a corporation required to file Form 990-T). However, you cannot file Form 8868 electronically if (1) you want the additional (not automatic) 3-month extension or (2) you file Forms 990-BL, 990-EZ, or 990-T, group returns, or a composite or consolidated Form 990-T. Instead, you must submit the fully completed and signed page 2 (Part II) of Form 8868. For more details on the electronic filing of this form, visit www.irs.gov/e-file and click on e-file for Charities & Nonprofits.

**Name of Exempt Organization**

ACCION TEXAS, INC. 74-2712770

**Number, street, and room or suite no. if a P.O. box, see instructions.**

2014 S. HACKBERRY ST.

**City, town or post office, state, and ZIP code. For a foreign address, see instructions.**

SAN ANTONIO, TX 78210

**Check type of return to be filed (file a separate application for each return):**

- [X] Form 990
- [ ] Form 990-BL
- [ ] Form 990-T (corporation)
- [ ] Form 990-T (sec. 401(a) or 403(a) trust)
- [ ] Form 990-EZ
- [ ] Form 990-T (trust other than above)
- [ ] Form 990-PF
- [ ] Form 1041-A
- [ ] Form 4720
- [ ] Form 6227
- [ ] Form 6069
- [ ] Form 8877

**Telephone No.** 210-226-3664  **FAX No.**

**GUSTAVO LASALA,** 2014 S. HACKBERRY STREET - SAN ANTONIO, TX 78210

**If the organization does not have an office or place of business in the United States, check this box ..........................................................**

**If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) __________ , if this is for the whole group, check this box ►. If it is for part of the group, check this box □ and attach a list with the names and EINs of all members the extension will cover.**

1 I request an automatic 3-month (6-months for a corporation required to file Form 990-T) extension of time until

AUGUST 15, 2010 , to file the exempt organization return for the organization named above. The extension is for the organization's return for:

- [X] calendar year 2009 or
- [ ] tax year beginning __________ , and ending __________ .

2 If this tax year is for less than 12 months, check reason: □ initial return  □ Final return  □ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.

3b If this application is for Form 990-PF or 990-T, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.

3c Balance Due. Subtract line 3b from line 3a. Include your payment with this form, or, if required, deposit with FTD coupon or, if required, by using EFTPS (Electronic Federal Tax Payment System).

See instructions.

3a $  
3b $  
3c $ N/A

Caution. If you are going to make an electronic fund withdrawal with this Form 8868, see Form 8453-EO and Form 8879-EO for payment instructions.

LHA For Privacy Act and Paperwork Reduction Act Notice, see Instructions.

Form 8868 (Rev. 4-2009)