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

2008

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

For calendar year 2008, or tax year beginning OCT 1, 2008, and ending SEP 30, 2009

G Check all that apply ☐ Initial return ☐ Final return ☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.	Name of foundation FISHER AND FUEL SOCIETY OF BEVERLY		A Employer identification number 04-6039361
	Number and street (or P O box number if mail is not delivered to street address)	Room/suite	B Telephone number (978) 922-2100
	240 CABOT STREET		C If exemption application is pending, check here <input type="checkbox"/> D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/> E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/> F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>
	City or town, state, and ZIP code BEVERLY, MA 01915		
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation			
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,468,062.		J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	
(Part I, column (d) must be on cash basis.)			

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)	
Revenue	1 Contributions, gifts, grants, etc., received					
	2 Check <input checked="" type="checkbox"/> if the foundation is not required to attach Sch. B					
	3 Interest on savings and temporary cash investments	44.	44.	44.	STATEMENT 2	
	4 Dividends and interest from securities	49,556.	49,556.	49,556.	STATEMENT 3	
	5a Gross rents					
	b Net rental income or (loss)					
	6a Net gain or (loss) from sale of assets not on line 10	<12,879.>			STATEMENT 1	
	b Gross sales price for all assets on line 6a	242,574.				
	7 Capital gain net income (from Part IV, line 2)		0.			
	8 Net short-term capital gain					
	9 Income modifications					
	10a Gross sales less returns and allowances					
b Less Cost of goods sold						
c Gross profit or (loss)						
11 Other income						
12 Total. Add lines 1 through 11	36,721.	49,600.	49,600.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	2,000.	1,332.	1,332.	668.	
	14 Other employee salaries and wages					
	15 Pension plans, employee benefits					
	16a Legal fees					
	b Accounting fees	STMT 4	2,600.	1,734.	1,734.	866.
	c Other professional fees	STMT 5	8,292.	2,073.	2,073.	6,219.
	17 Interest					
	18 Taxes	STMT 6	1,441.	0.	0.	0.
	19 Depreciation and depletion					
	20 Occupancy					
	21 Travel, conferences, and meetings					
	22 Printing and publications					
	23 Other expenses	STMT 7	634.	0.	0.	634.
	24 Total operating and administrative expenses. Add lines 13 through 23		14,967.	5,139.	5,139.	8,387.
	25 Contributions, gifts, grants paid		76,187.			76,187.
26 Total expenses and disbursements. Add lines 24 and 25		91,154.	5,139.	5,139.	84,574.	
27 Subtract line 26 from line 12		<54,433.>				
a Excess of revenue over expenses and disbursements						
b Net investment income (if negative, enter -0-)		44,461.				
c Adjusted net income (if negative, enter -0-)			44,461.			

Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	4,961.	2,553.	2,553.
	3 Accounts receivable ▶			
	Less allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U S and state government obligations			
	b Investments - corporate stock STMT 8	1,289,841.	1,237,816.	1,465,509.
	c Investments - corporate bonds			
Liabilities	11 Investments - land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	12 Investments - mortgage loans			
	13 Investments - other			
	14 Land, buildings, and equipment basis ▶			
	Less accumulated depreciation ▶			
	15 Other assets (describe ▶)			
	16 Total assets (to be completed by all filers)	1,294,802.	1,240,369.	1,468,062.
	17 Accounts payable and accrued expenses			
	18 Grants payable			
Net Assets or Fund Balances	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
23 Total liabilities (add lines 17 through 22)	0.	0.		
Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/>	24 Unrestricted	1,294,802.	1,240,369.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances	1,294,802.	1,240,369.	
31 Total liabilities and net assets/fund balances	1,294,802.	1,240,369.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,294,802.
2 Enter amount from Part I, line 27a	2	<54,433.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,240,369.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,240,369.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)			(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a					
b SEE ATTACHED STATEMENTS					
c					
d					
e					
(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)		
a					
b					
c					
d					
e 242,574.		255,453.	<12,879.>		
Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(i) Gains (Col. (h) gain minus col. (k), but not less than -0-) or Losses (from col. (h))		
(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col. (i) over col. (j), if any			
a					
b					
c					
d					
e			<12,879.>		
2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }			2	<12,879.>	
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8			3	0.	

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

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

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

Was the foundation liable for the section 4942 tax on the distributable amount of any year in the base period?

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col. (b) divided by col. (c))
2007	74,970.	1,689,188.	.044382
2006	83,088.	1,767,485.	.047009
2005	74,410.	1,675,367.	.044414
2004	59,388.	1,621,819.	.036618
2003	91,558.	1,611,286.	.056823
2 Total of line 1, column (d)			2 .229246
3 Average distribution ratio for the 5-year base period - divide the total on line 2 by 5, or by the number of years the foundation has been in existence if less than 5 years			3 .045849
4 Enter the net value of noncharitable-use assets for 2008 from Part X, line 5			4 1,440,587.
5 Multiply line 4 by line 3			5 66,049.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 445.
7 Add lines 5 and 6			7 66,494.
8 Enter qualifying distributions from Part XII, line 4			8 84,574.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling letter _____ (attach copy of ruling letter if necessary-see instructions)		1	445.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b			
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col. (b)		2	0.
2 Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		3	445.
3 Add lines 1 and 2		4	0.
4 Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)		5	445.
5 Tax based on investment income. Subtract line 4 from line 3. If zero or less, enter -0-			
6 Credits/Payments			
a 2008 estimated tax payments and 2007 overpayment credited to 2008	6a 3,000.	7	3,000.
b Exempt foreign organizations - tax withheld at source	6b	8	
c Tax paid with application for extension of time to file (Form 8868)	6c	9	
d Backup withholding erroneously withheld	6d	10	2,555.
7 Total credits and payments. Add lines 6a through 6d		11	0.
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> if Form 2220 is attached			
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed			
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid			
11 Enter the amount of line 10 to be Credited to 2009 estimated tax	2,555. Refunded		

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
1c Did the foundation file Form 1120-POL for this year?		X
d Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year (1) On the foundation <input type="checkbox"/> \$ 0. (2) On foundation managers <input type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col. (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input type="checkbox"/> MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2008 or the taxable year beginning in 2008 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► AVIS BEAULIEU, TREASURER Telephone no ► (978) 922-2100 Located at ► 240 CABOT STREET, BEVERLY, MA ZIP+4 ► 01915			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year	15		N/A

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

File Form 4720 if any item is checked in the "Yes" column, unless an exception applies.

	Yes	No
1a During the year did the foundation (either directly or indirectly)		
(1) Engage in the sale or exchange, or leasing of property with a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(5) Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
(6) Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days)	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 20 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here	N/A	1b
c Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 2008?		1c X
2 Taxes on failure to distribute income (section 4942) (does not apply for years the foundation was a private operating foundation defined in section 4942(j)(3) or 4942(j)(5))		
a At the end of tax year 2008, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2008? If "Yes," list the years ►	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions)	N/A	2b
c If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here ►		
3a Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No	
b If "Yes," did it have excess business holdings in 2008 as a result of (1) any purchase by the foundation or disqualified persons after May 26, 1969, (2) the lapse of the 5-year period (or longer period approved by the Commissioner under section 4943(c)(7)) to dispose of holdings acquired by gift or bequest, or (3) the lapse of the 10-, 15-, or 20-year first phase holding period? (Use Schedule C, Form 4720, to determine if the foundation had excess business holdings in 2008.)	N/A	3b
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?		4a X
b Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2008?		4b X

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Part VII-B Statements Regarding Activities for Which Form 4720 May Be Required (continued)**5a** During the year did the foundation pay or incur any amount to

(1) Carry on propaganda, or otherwise attempt to influence legislation (section 4945(e))?

☐ Yes ☒ No

(2) Influence the outcome of any specific public election (see section 4955), or to carry on, directly or indirectly, any voter registration drive?

☐ Yes ☒ No

(3) Provide a grant to an individual for travel, study, or other similar purposes?

☐ Yes ☒ No

(4) Provide a grant to an organization other than a charitable, etc., organization described in section 509(a)(1), (2), or (3), or section 4940(d)(2)?

☐ Yes ☒ No

(5) Provide for any purpose other than religious, charitable, scientific, literary, or educational purposes, or for the prevention of cruelty to children or animals?

☐ Yes ☒ No**b** If any answer is "Yes" to 5a(1)-(5), did any of the transactions fail to qualify under the exceptions described in Regulations section 53.4945 or in a current notice regarding disaster assistance (see instructions)?

N/A

5b

Organizations relying on a current notice regarding disaster assistance check here

☒**c** If the answer is "Yes" to question 5a(4), does the foundation claim exemption from the tax because it maintained expenditure responsibility for the grant?

N/A

☐ Yes ☐ No

If "Yes," attach the statement required by Regulations section 53.4945-5(d).

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

X

If you answered "Yes" to 6b, also file Form 8870.

7a At any time during the tax year, was the foundation a party to a prohibited tax shelter transaction?☐ Yes ☒ No**b** If yes, did the foundation receive any proceeds or have any net income attributable to the transaction?

N/A

7b**Part VIII** Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors**1** List all officers, directors, trustees, foundation managers and their compensation.

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 9		2,000.	0.	0.

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

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

Total number of other employees paid over \$50,000

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes		
a	Average monthly fair market value of securities	1a	1,458,768.
b	Average of monthly cash balances	1b	3,757.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,462,525.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,462,525.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	21,938.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,440,587.
6	Minimum investment return. Enter 5% of line 5	6	72,029.

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

1	Minimum investment return from Part X, line 6	1	72,029.
2a	Tax on investment income for 2008 from Part VI, line 5	2a	445.
b	Income tax for 2008 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	445.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	71,584.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	71,584.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	71,584.

Part XII Qualifying Distributions (see instructions)

1	Amounts paid (including administrative expenses) to accomplish charitable, etc., purposes		
a	Expenses, contributions, gifts, etc. - total from Part I, column (d), line 26	1a	84,574.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	84,574.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	445.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	84,129.

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

Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2007	(c) 2007	(d) 2008
1 Distributable amount for 2008 from Part XI, line 7				71,584.
2 Undistributed income, if any, as of the end of 2007				
a Enter amount for 2007 only			78,998.	
b Total for prior years.		0.		
3 Excess distributions carryover, if any, to 2008				
a From 2003				
b From 2004				
c From 2005				
d From 2006				
e From 2007				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2008 from Part XII, line 4 ▶ \$ 84,574.				
a Applied to 2007, but not more than line 2a			78,998.	
b Applied to undistributed income of prior years (Election required - see instructions)		0.		
c Treated as distributions out of corpus (Election required - see instructions)	0.			
d Applied to 2008 distributable amount				5,576.
e Remaining amount distributed out of corpus	0.			
5 Excess distributions carryover applied to 2008 (If an amount appears in column (d), the same amount must be shown in column (a).)	0.			0.
6 Enter the net total of each column as indicated below:				
a Corpus. Add lines 3f, 4c, and 4e. Subtract line 5	0.			
b Prior years' undistributed income. Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b. Taxable amount - see instructions		0.		
e Undistributed income for 2007. Subtract line 4a from line 2a. Taxable amount - see instr			0.	
f Undistributed income for 2008. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2009				66,008.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2003 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2009. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2004				
b Excess from 2005				
c Excess from 2006				
d Excess from 2007				
e Excess from 2008				

Part XV Supplementary Information (continued)**3 Grants and Contributions Paid During the Year or Approved for Future Payment**

Recipient	If recipient is an individual, show any relationship to any foundation manager or substantial contributor	Foundation status of recipient	Purpose of grant or contribution	Amount
Name and address (home or business)				
a Paid during the year				
VARIOUS INDIVIDUALS, (SEE ATTACHED)	NONE	N/A	FOR NEEDY & POOR IN CITY OF BEVERLY	53,787.
VARIOUS ORGANIZATIONS, (SEE ATTACHED)	NONE			22,400.
Total			3a	76,187.
b Approved for future payment				
NONE				
Total			3b	0.

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

- | | | Yes | No |
|----------|--|-----|----|
| 1 | Did the organization directly or indirectly engage in any of the following with any other organization described in section 501(c) of the Code (other than section 501(c)(3) organizations) or in section 527, relating to political organizations? | | |
| a | Transfers from the reporting foundation to a noncharitable exempt organization of | | |
| | (1) Cash | | X |
| | (2) Other assets | | X |
| b | Other transactions | | |
| | (1) Sales of assets to a noncharitable exempt organization | | X |
| | (2) Purchases of assets from a noncharitable exempt organization | | X |
| | (3) Rental of facilities, equipment, or other assets | | X |
| | (4) Reimbursement arrangements | | X |
| | (5) Loans or loan guarantees | | X |
| | (6) Performance of services or membership or fundraising solicitations | | X |
| c | Sharing of facilities, equipment, mailing lists, other assets, or paid employees | | X |
| d | If the answer to any of the above is "Yes," complete the following schedule. Column (b) should always show the fair market value of the goods, other assets, or services given by the reporting foundation. If the foundation received less than fair market value in any transaction or sharing arrangement, show in column (d) the value of the goods, other assets, or services received. | | |

[illegible]

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

- b** If "Yes," complete the following schedule

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

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

Paid Preparer's Use Only Signature of officer or trustee Date Title	Signature of officer or trustee <i>Chris A. Beaulieu</i>		Date 11/07/09		Title TREASURER	
	Preparer's signature <i>[Signature]</i>		Date 11/07/09		Check if self-employed <input type="checkbox"/>	
Firm's name (or yours if self-employed), address, and ZIP code SHUMAN & EPSTEIN, LLC 8 ESSEX CENTER DRIVE PEABODY, MA 01960			Preparer's identifying number EIN Phone no 978-531-2600			

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	ALLSTATE CORP		12/08/04	11/18/08
b	FEDERAL FARM CREDIT		11/28/05	12/03/08
c	PFIZER INC		09/18/95	12/09/08
d	JOHNSON & JOHNSON		02/08/88	12/09/08
e	ABBOTT LABORATORIES		06/01/98	12/09/08
f	CITIGROUP INC		01/02/02	12/19/08
g	FIDELITY ADVISOR MIDCAP		10/22/02	01/07/09
h	FEDERAL HOME LOAN BK		05/31/02	01/08/09
i	FEDERAL HOME LOAN BK		08/29/08	03/26/09
j	WALMART STORES INC		10/01/01	04/07/09
k	EXXON-MOBIL CORP		12/03/99	05/06/09
l	CISCO SYSTEMS INC		09/18/95	06/11/09
m	DELL INC		05/17/02	06/11/09
n	HEWLETT PACKARD CO		06/14/00	06/11/09
o	INTEL CORP		10/30/07	06/11/09

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,460.		5,140.	<2,680.>
b 50,000.		50,000.	0.
c 2,467.		1,190.	1,277.
d 4,870.		414.	4,456.
e 6,597.		2,277.	4,320.
f 3,885.		24,824.	<20,939.>
g 13,345.		24,225.	<10,880.>
h 55,000.		55,526.	<526.>
i 50,000.		50,000.	0.
j 2,156.		1,956.	200.
k 1,684.		472.	1,212.
l 7,690.		1,541.	6,149.
m 2,666.		5,997.	<3,331.>
n 5,928.		2,655.	3,273.
o 1,269.		2,106.	<837.>

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			<2,680.>
b			0.
c			1,277.
d			4,456.
e			4,320.
f			<20,939.>
g			<10,880.>
h			<526.>
i			** 0.
j			200.
k			1,212.
l			6,149.
m			<3,331.>
n			3,273.
o			<837.>

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7
If (loss), enter "-0-" in Part I, line 7 }

2

3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6)
If gain, also enter in Part I, line 8, column (c)
If (loss), enter "-0-" in Part I, line 8

3

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co	(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a MICROSOFT CORP		01/23/96	06/11/09
b WALMART STORES INC		10/01/01	06/16/09
c PROCTOR & GAMBLE CO		08/29/91	06/16/09
d AIG CLASS ACTION		VARIOUS	06/17/09
e FEDERAL HOME LOAN BK		09/25/07	08/27/09
f CARDINAL HEALTH LITIGATION		VARIOUS	09/09/09
g			
h			
i			
j			
k			
l			
m			
n			
o			

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 2,955.		725.	2,230.
b 747.		734.	13.
c 3,413.		671.	2,742.
d 217.			217.
e 25,000.		25,000.	0.
f 225.			225.
g			
h			
i			
j			
k			
l			
m			
n			
o			

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			2,230.
b			13.
c			2,742.
d			217.
e			0.
f			225.
g			
h			
i			
j			
k			
l			
m			
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	<12,879.>
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	0.

FORM 990-PF GAIN OR (LOSS) FROM SALE OF ASSETS STATEMENT 1

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
ALLSTATE CORP				12/08/04	11/18/08
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
2,460.	5,140.	0.	0.	<2,680.>	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
FEDERAL FARM CREDIT				11/28/05	12/03/08
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
50,000.	50,000.	0.	0.	0.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PFIZER INC				09/18/95	12/09/08
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
2,467.	1,190.	0.	0.	1,277.	

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
JOHNSON & JOHNSON			02/08/88	12/09/08
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
4,870.	414.	0.	0.	4,456.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
ABBOTT LABORATORIES			06/01/98	12/09/08
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
6,597.	2,277.	0.	0.	4,320.

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
CITIGROUP INC			01/02/02	12/19/08
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
3,885.	24,824.	0.	0.	<20,939.>

(A) DESCRIPTION OF PROPERTY	MANNER ACQUIRED		DATE ACQUIRED	DATE SOLD
FIDELITY ADVISOR MIDCAP			10/22/02	01/07/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
13,345.	24,225.	0.	0.	<10,880.>

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
FEDERAL HOME LOAN BK				05/31/02	01/08/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
55,000.	55,526.	0.	0.	<526.>	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
FEDERAL HOME LOAN BK				08/29/08	03/26/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
50,000.	50,000.	0.	0.	0.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
WALMART STORES INC				10/01/01	04/07/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
2,156.	1,956.	0.	0.	200.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
EXXON-MOBIL CORP				12/03/99	05/06/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
1,684.	472.	0.	0.	1,212.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
CISCO SYSTEMS INC				09/18/95	06/11/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
7,690.	1,541.	0.	0.	6,149.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
DELL INC				05/17/02	06/11/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
2,666.	5,997.	0.	0.	<3,331.>	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
HEWLETT PACKARD CO				06/14/00	06/11/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
5,928.	2,655.	0.	0.	3,273.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
INTEL CORP				10/30/07	06/11/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
1,269.	2,106.	0.	0.	<837.>	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
MICROSOFT CORP				01/23/96	06/11/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
2,955.	725.	0.	0.	2,230.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
WALMART STORES INC				10/01/01	06/16/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
747.	734.	0.	0.	13.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
PROCTOR & GAMBLE CO				08/29/91	06/16/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
3,413.	671.	0.	0.	2,742.	

(A) DESCRIPTION OF PROPERTY			MANNER ACQUIRED	DATE ACQUIRED	DATE SOLD
AIG CLASS ACTION				VARIOUS	06/17/09
(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS	
217.	0.	0.	0.	217.	

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
FEDERAL HOME LOAN BK	25,000.	25,000.	0.	0.	0.

(A) DESCRIPTION OF PROPERTY	(B) GROSS SALES PRICE	(C) COST OR OTHER BASIS	(D) EXPENSE OF SALE	(E) DEPREC.	(F) GAIN OR LOSS
CARDINAL HEALTH LITIGATION	225.	0.	0.	0.	225.

CAPITAL GAINS DIVIDENDS FROM PART IV	0.
TOTAL TO FORM 990-PF, PART I, LINE 6A	<12,879.>

FORM 990-PF	INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS	STATEMENT	2
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SOURCE	AMOUNT
BEVERLY NATIONAL BANK	44.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	44.

FORM 990-PF	DIVIDENDS AND INTEREST FROM SECURITIES	STATEMENT	3
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SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
BEVERLY NATIONAL BANK	49,556.	0.	49,556.
TOTAL TO FM 990-PF, PART I, LN 4	49,556.	0.	49,556.

FORM 990-PF	ACCOUNTING FEES			STATEMENT	4
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
PROFESSIONAL FEES	2,600.	1,734.	1,734.	866.	
TO FORM 990-PF, PG 1, LN 16B	2,600.	1,734.	1,734.	866.	

FORM 990-PF	OTHER PROFESSIONAL FEES			STATEMENT	5
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
INVESTMENT MANAGEMENT FEES	8,292.	2,073.	2,073.	6,219.	
TO FORM 990-PF, PG 1, LN 16C	8,292.	2,073.	2,073.	6,219.	

FORM 990-PF	TAXES			STATEMENT	6
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
FEDERAL AND STATE TAXES	1,441.	0.	0.	0.	
TO FORM 990-PF, PG 1, LN 18	1,441.	0.	0.	0.	

FORM 990-PF	OTHER EXPENSES			STATEMENT	7
DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES	
OFFICE EXPENSES	634.	0.	0.	634.	
TO FORM 990-PF, PG 1, LN 23	634.	0.	0.	634.	

FORM 990-PF	CORPORATE STOCK	STATEMENT	8
DESCRIPTION	BOOK VALUE	FAIR MARKET VALUE	
PUBLICLY TRADED CORPORATIONS	1,237,816.	1,465,509.	
TOTAL TO FORM 990-PF, PART II, LINE 10B	1,237,816.	1,465,509.	

FORM 990-PF	PART VIII - LIST OF OFFICERS, DIRECTORS TRUSTEES AND FOUNDATION MANAGERS	STATEMENT	9
NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN EXPENSE CONTRIB ACCOUNT
LAWRENCE M. SMITH 85 GROVER STREET BEVERLY, MA 01915	PRESIDENT/TRUSTEE 1.00	0.	0. 0.
AVIS A. BEAULIEU 150 PINE STREET DANVERS, MA 01923	TREASURER/SECRETARY 3.00	2,000.	0. 0.
RICHARD F. MOONEY 95 BAKER AVENUE BEVERLY, MA 01915	TRUSTEE 1.00	0.	0. 0.
PETER A. HERSEE 17 JUNIPER STREET WENHAM, MA 01984	TRUSTEE 1.00	0.	0. 0.
JOHN E. GLOVSKY, ESQUIRE 8 WASHINGTON STREET BEVERLY, MA 01915	TRUSTEE 1.00	0.	0. 0.
JOHN PUTNEY 29 BERRYWOOD LANE BEVERLY, MA 01915	TRUSTEE 1.00	0.	0. 0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		2,000.	0. 0.

FORM 990-PF

GRANT APPLICATION SUBMISSION INFORMATION
PART XV, LINES 2A THROUGH 2D

STATEMENT 10

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

AVIS BEAULIEU
240 CABOT STREET
BEVERLY, MA 01915

TELEPHONE NUMBER

(978)922-2100

FORM AND CONTENT OF APPLICATIONS

WRITTEN INFORMAL APPEAL FROM CLERGY, SOCIAL WELFARE AGENCY OR OTHER
RECOGNIZED AGENCY ATTESTING TO THE NEED OF THE PERSON(S) REQUESTING AID.

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

TO ASSIST ANY INHABITANT OF BEVERLY WHO BY REASON OF ILLNESS OR MISFORTUNE
MAY NEED SPECIAL ASSISTANCE.

FISHER AND FUEL SOCIETY OF BEVERLY
Breakdown of Disbursements by Category
October 1, 2008 - September 30, 2009

04-6039361 990PF attachment, pg 11

<u>REFERRED BY</u>	<u>ASSISTANCE FOR</u>	<u>BEVERLY ADDRESS</u>	<u>AMOUNT</u>
St Vincent de Paul	Bonnie McGovern	11 Roundy Street	\$1,200 00
St Vincent de Paul	Hope Phelan	8 Pickett Street	\$341 30
NASCAP	Sherrill Ambrose	24 Simon Street	\$629 87
St Vincent de Paul	Dennis & Wendy Soper	38 Grant Street	\$325 00
St Vincent de Paul	Dennis & Wendy Soper	38 Grant Street	\$325 00
St Vincent de Paul	Vanessa & Christopher Br	5 Roundy Street	\$650 00
St Vincent de Paul	Michelle Ward	71 Sohler Road	\$637 63
Beverly Council on Aging	Sandra & Reuben Morse	101 Rantoul Street	\$600 00
Beverly Council on Aging	Michael & Scott Morse	101 Rantoul Street	\$400 00
Beverly Bootstraps	Marie Tower	37 Grant Street	\$750 00
St Vincent de Paul	Anabela Afonso	429 Cabot Street	\$495 03
St Vincent de Paul	Anabela Afonso	429 Cabot Street	\$190 94
Beverly Bootstraps	Heather Lee Smith	35 Hilltop Drive	\$132 00
Beverly Bootstraps	Debra Bassett	15 Dolloff Avenue	\$365 25
Beverly Bootstraps	Shawna Belanger	public housing	\$414 78
Beverly Bootstraps	Shawna Belanger	public housing	\$180 00
Beverly Bootstraps	Gina Bates	132 Essex Street	\$463 00
	void prior year check		-\$435 80
	TOTAL NATIONAL GRID		\$7,664.00
St Vincent de Paul	Danielle Beaulieu	19 Mill Street	\$1,300 00
Beverly Bootstraps	Migdala Baptista	327 Elliott Street	\$1,200 00
NASCAP	Monieke McNeil	33 Elliott Street	\$1,100 00
Beverly Bootstraps	Gary Meyer	464 Cabot Street	\$414 00
St Vincent de Paul	Kimberly Van Loon	461 Rantoul Street	\$1,500 00
NASCAP	Christine Willis	36 Dearborn Avenue	\$700 00
Beverly Bootstraps	Anny Santa	21 Beckford Street	\$835 00
NASCAP	Sheri Sabino	901 Manor Road	\$608 53
NASCAP	Krista Jones	707 Manor Road	\$750 00
NASCAP	Krista Jones	707 Manor Road	\$250 00
St Vincent de Paul	Ronda Kersey	443 Cabot Street	\$650 00
St Vincent de Paul	Virginia Coffin	26 Grant Street	\$1,000 00
St Vincent de Paul	Hope Phelan	8 Pickett Street	\$1,000 00
St Vincent de Paul	Howard & Makebe Gray	13A Pleasant Street	\$1,000 00
Beverly Bootstraps	Dawn Frost	4 Highland Avenue	\$825 00
St Vincent de Paul	Sandra Almonte	131 Cabot Street	\$400 00
NASCAP	Diana Morrissey	30 Hilltop Drive	\$1,000 00
NASCAP	Vanessa Everett	201 Manor Road	\$1,100 00
Beverly Bootstraps	Edward Parent	6 Colby Road	\$525 00
St Vincent de Paul	Debra Bassett	15 Dolloff Street	\$1,500 00
NASCAP	Monieke McNeil	33 Elliott Street	\$550 00
St Vincent de Paul	Kathleen Conant	427 Cabot Street	\$750 00
NASCAP	Freda Porter	55 Folly Pond Road	\$1,250.00
NASCAP	Norman Theriault	20 Sohler Road	\$750 00
St Vincent de Paul	Ann Mahoney	215 Rantoul Street	\$492 51
Beverly Bootstraps	Laura Boyce	2 Dearborn Avenue	\$1,000 00
Beverly Bootstraps	Daniel Halbett	43 Charnock Street	\$500.00
NASCAP	Trista Sanderson	302 Manor Road	\$476 00
Beverly Bootstraps	Lisa Hickey	50 Parramatta Road	\$1,098 00
Beverly Bootstraps	Victor Cervera	26 Bartlett Street	\$425 00
NASCAP	Barbara and John Ostran	9 Bennett Street	\$1,250 00
Beverly Bootstraps	Heather Lee Smith	35 Hilltop Drive	\$127 00
The Salvation Army	Elizabeth Blackburn	22 Chipman Road	\$1,000 00
Beverly Bootstraps	Tom Martin	364 Cabot Street	\$1,000 00
NASCAP	Amanda Soper	601 Manor Road	\$611 00
NASCAP	Jamie Duncan	41 Story Avenue	\$491 00
Beverly Bootstraps	Rita McCay	10 Lothrop Street	\$1,300 00
Harborlight House	Richard	One Monument Square	\$1,576 00

<u>REFERRED BY</u>	<u>ASSISTANCE FOR</u>	<u>BEVERLY ADDRESS</u>	<u>AMOUNT</u>
Beverly Bootstraps	Holly Chouinard	20 Bow Street	\$900 00
Beverly Bootstraps	Kim Ostrowski	1201 Broughton Drive	\$1,577 00
Beverly Bootstraps	Patrick Ryan	1 Columbus Avenue	\$1,350 00
NASCAP	Malinda Oates	603 Manor Road	\$626 00
Beverly Bootstraps	Della Rossetti	215 Rantoul Street	\$851 00
Beverly Bootstraps	Tiffany Clark	903 Manor Road	\$1,000 00
Beverly Bootstraps	Daliah Campbell	24A Simon Street	\$627 00
St Vincent de Paul	Stephanie Flynn	6 Grant Street	\$975 00
Beverly Bootstraps	Heather Torsey	7 Home Street	\$850 00
NASCAP	Charles Cresoe	245 Cabot Street	\$720 00
NASCAP	Barbara and John Ostran	9 Bennett Street	\$1,250 00
Beverly Bootstraps	Claudia Benitez	Home Street	\$1,000 00
Beverly Bootstraps	Kathy & Joe Archambault	33 Thorndike Street	\$1,500 00
TOTAL HOUSING			\$45,530.04
The Salvation Army			\$2,400 00
North Shore United Way			\$10,000 00
North Shore United Way			\$7,500 00
SeniorCare			\$2,500 00
TOTAL DIST. TO ORGANIZATIONS			\$22,400.00
NASCAP	Trista Sanderson	20 Sohier Road	\$242 76
St Vincent de Paul	Linda Michalski	33 Mill Street	\$350 00
TOTAL OTHER			\$592.76
TOTAL DIRECT AID			\$76,186.80