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Form **990-PF**

Department of the Treasury
Internal Revenue Service

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

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

OMB No 1545-0052

2009

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

G Check all that apply: ☐ Initial return ☐ Initial Return of a former public charity ☐ Final return
☐ Amended return ☐ Address change ☐ Name change

Use the IRS label. Otherwise, print or type. See Specific Instructions.

R.M. BEALL SR. CHARITABLE FOUNDATION
1806 38TH AVE EAST
BRADENTON, FL 34208

A Employer identification number: 59-2851924

B Telephone number (see the instructions): (941) 747-2355

C If exemption application is pending, check here ► ☐

D 1 Foreign organizations, check here ► ☐
2 Foreign organizations meeting the 85% test, check here and attach computation ► ☐

E If private foundation status was terminated under section 507(b)(1)(A), check here ► ☐

F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here ► ☐

H Check type of organization: ☒ Section 501(c)(3) exempt private foundation
☐ Section 4947(a)(1) nonexempt charitable trust ☐ Other taxable private foundation

I Fair market value of all assets at end of year (from Part II, column (c), line 16) ► $ 3,274,977.

J Accounting method: ☐ Cash ☒ Accrual ☐ 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) (see the instructions))*

		(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 (att sch)	4,527.			
	2 Ck ► ☒ if the foundn is not req to att Sch B				
	3 Interest on savings and temporary cash investments	27.	27.	27.	
	4 Dividends and interest from securities	42,693.	42,693.	42,693.	
	5a Gross rents				
	b Net rental income or (loss)				
	6a Net gain/(loss) from sale of assets not on line 10	-112,061.			
	b Gross sales price for all assets on line 6a 419,237.				
	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/(loss) (att sch)				
	11 Other income (attach schedule)				
	12 **Total.** Add lines 1 through 11	-64,814.	42,720.	42,720.	
OPERATING AND ADMINISTRATIVE EXPENSES	13 Compensation of officers, directors, trustees, etc	0.			
	14 Other employee salaries and wages				
	15 Pension plans, employee benefits				
	16a Legal fees (attach schedule)				
	b Accounting fees (attach sch) See St 1	9,500.			9,500.
	c Other prof fees (attach sch) See St 2	67,292.	12,643.		54,649.
	17 Interest				
	18 Taxes (attach schedule)(see instr) See Stm 3	1,175.			1,175.
	19 Depreciation (attach sch) and depletion				
	20 Occupancy				
	21 Travel, conferences, and meetings				
	22 Printing and publications				
	23 Other expenses (attach schedule)				
	24 **Total operating and administrative expenses.** Add lines 13 through 23	77,967.	12,643.		65,324.
	25 Contributions, gifts, grants paid Part XV	98,792.			98,792.
	26 **Total expenses and disbursements.** Add lines 24 and 25	176,759.	12,643.	0.	164,116.
	27 Subtract line 26 from line 12:				
	a **Excess of revenue over expenses and disbursements**	-241,573.			
	b **Net investment income** (if negative, enter -0-)		30,077.		
	c **Adjusted net income** (if negative, enter -0-)			42,720.	

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Part II Balance Sheets Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1 Cash – non-interest-bearing	103,961.	-12,703.	-12,703.
	2 Savings and temporary cash investments	335,604.	424,178.	424,178.
	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 (attach schedule) (see the instructions)			
	7 Other notes and loans receivable (attach sch) ►			
	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 (attach schedule) Statement 4	100,271.	50,271.	53,172.
	b Investments – corporate stock (attach schedule) Statement 5	3,002,521.	2,889,426.	2,457,270.
	c Investments – corporate bonds (attach schedule) Statement 6	388,972.	341,481.	353,060.
	11 Investments – land, buildings, and equipment: basis ►			
	Less: accumulated depreciation (attach schedule) ►			
	12 Investments – mortgage loans			
	13 Investments – other (attach schedule)			
	14 Land, buildings, and equipment: basis ►			
	Less accumulated depreciation (attach schedule) ►			
	15 Other assets (describe ►)			
	16 **Total assets** (to be completed by all filers – see instructions. Also, see page 1, item I)	3,931,329.	3,692,653.	3,274,977.
LIABILITIES	17 Accounts payable and accrued expenses	600.	3,500.	
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe ►)	3.		
	23 **Total liabilities** (add lines 17 through 22)	603.	3,500.	
NET ASSETS OR FUND BALANCES	**Foundations that follow SFAS 117, check here ► ☐ and complete lines 24 through 26 and lines 30 and 31.**			
	24 Unrestricted			
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ► ☒ and complete lines 27 through 31.			
	27 Capital stock, trust principal, or current funds	3,930,726.	3,689,153.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 **Total net assets or fund balances** (see the instructions)	3,930,726.	3,689,153.	
	31 **Total liabilities and net assets/fund balances** (see the instructions)	3,931,329.	3,692,653.	

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	3,930,726.
2	Enter amount from Part I, line 27a	2	-241,573.
3	Other increases not included in line 2 (itemize) ►	3	
4	Add lines 1, 2, and 3	4	3,689,153.
5	Decreases not included in line 2 (itemize) ►	5	
6	Total net assets or fund balances at end of year (line 4 minus line 5) – Part II, column (b), line 30	6	3,689,153.

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 shares MLC Company)	(b) How acquired P — Purchase D — Donation	(c) Date acquired (month, day, year)	(d) Date sold (month, day, year)
1a	See Statement 7			
b				
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				

	Complete only for assets showing gain in column (h) and owned by the foundation on 12/31/69			(l) Gains (Column (h) gain minus column (k), but not less than -0-) or Losses (from column (h))
	(i) Fair Market Value as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of column (i) over column (j), if any	
a				
b				
c				
d				
e				

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	-112,061.
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) (see the instructions) 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 the 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 (column (b) divided by column (c))
2008	109,897.	3,758,691.	0.029238
2007	157,171.	5,008,672.	0.031380
2006	199,340.	5,213,695.	0.038234
2005	269,072.	4,784,149.	0.056242
2004	291,329.	4,223,604.	0.068976

2	**Total** of line 1, column (d)	2	0.224070
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	0.044814
4	Enter the net value of noncharitable-use assets for 2009 from Part X, line 5	4	2,953,720.
5	Multiply line 4 by line 3	5	132,368.
6	Enter 1% of net investment income (1% of Part I, line 27b)	6	301.
7	Add lines 5 and 6	7	132,669.
8	Enter qualifying distributions from Part XII, line 4	8	164,116.

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 the instructions)

1a	Exempt operating foundations described in section 4940(d)(2), check here ► ☐ and enter 'N/A' on line 1. Date of ruling or determination letter: _____ (attach copy of letter if necessary - see instr.)		
b	Domestic foundations that meet the section 4940(e) requirements in Part V, check here ► ☒ and enter 1% of Part I, line 27b	1	301.
c	All other domestic foundations enter 2% of line 27b Exempt foreign organizations enter 4% of Part I, line 12, column (b)		
2	Tax under section 511 (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	2	0.
3	Add lines 1 and 2	3	301.
4	Subtitle A (income) tax (domestic section 4947(a)(1) trusts and taxable foundations only. Others enter -0-)	4	0.
5	**Tax based on investment income.** Subtract line 4 from line 3. If zero or less, enter -0-	5	301.
6	Credits/Payments:		
a	2009 estimated tax pmts and 2008 overpayment credited to 2009 — 6a		
b	Exempt foreign organizations – tax withheld at source — 6b		
c	Tax paid with application for extension of time to file (Form 8868) — 6c		
d	Backup withholding erroneously withheld — 6d		
7	Total credits and payments. Add lines 6a through 6d	7	0.
8	Enter any **penalty** for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8	
9	**Tax due.** If the total of lines 5 and 8 is more than line 7, enter **amount owed** ►	9	301.
10	**Overpayment.** If line 7 is more than the total of lines 5 and 8, enter the **amount overpaid** ►	10	
11	Enter the amount of line 10 to be: **Credited to 2010 estimated tax** ► **Refunded** ►	11	

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?	1a		X
b	Did it spend more than $100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)?	1b		X
	*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*			
c	Did the foundation file **Form 1120-POL** for this year?	1c		X
d	Enter the amount (if any) of tax on political expenditures (section 4955) imposed during the year: **(1)** On the foundation ► $ 0. **(2)** On foundation managers ► $ 0.			
e	Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers ► $ 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*	2		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*	3		X
4a	Did the foundation have unrelated business gross income of $1,000 or more during the year?	4a		X
b	If 'Yes,' has it filed a tax return on **Form 990-T** for this year?	4b		N/A
5	Was there a liquidation, termination, dissolution, or substantial contraction during the year? *If 'Yes,' attach the statement required by General Instruction T*	5		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?	6	X	
7	Did the foundation have at least $5,000 in assets at any time during the year? *If 'Yes,' complete Part II, column (c), and Part XV*	7	X	
8a	Enter the states to which the foundation reports or with which it is registered (see the instructions) ► FL			
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*	8b	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 2009 or the taxable year beginning in 2009 (see instructions for Part XIV)? *If 'Yes,' complete Part XIV.*	9		X
10	Did any persons become substantial contributors during the tax year? *If 'Yes,' attach a schedule listing their names and addresses*	10		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?	13	X	

Website address ► N/A

14 The books are in care of ► MICHAEL MADDALONI Telephone no. ► (941)747-2355

Located at ► 1806 38TH AVE. EAST BRADENTON FL ZIP + 4 ► 34208

15 Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of **Form 1041** – Check here. N/A .. ► ☐

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?	☐ Yes ☒ No		
	(2) Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person?	☐ Yes ☒ No		
	(3) Furnish goods, services, or facilities to (or accept them from) a disqualified person?	☐ Yes ☒ No		
	(4) Pay compensation to, or pay or reimburse the expenses of, a disqualified person?	☐ Yes ☒ 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)?	☐ Yes ☒ 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.)	☐ Yes ☒ 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 the instructions)?	1b	N/A	
	Organizations relying on a current notice regarding disaster assistance check here ► ☐			
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 2009?	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 2009, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2009? ☐ Yes ☒ No			
	If 'Yes,' list the years ► 20__ , 20__ , 20__ , 20__ .			
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 the instructions.)	2b	N/A	
c	If the provisions of section 4942(a)(2) are being applied to **any** of the years listed in 2a, list the years here. ► 20__ , 20__ , 20__ , 20__			
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? ☐ Yes ☒ No			
b	If 'Yes,' did it have excess business holdings in 2009 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 2009.)*	3b	N/A	
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 2009?	4b		X

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)? (see instructions)	☐ 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)?			5b N/A
	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	
b	Did the foundation, during the year, pay premiums, directly or indirectly, on a personal benefit contract?			6b X
	If 'Yes' to 6b, 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?			7b N/A

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 (see instructions).

(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
ROBERT M. BEALL, II 1806 38TH AVE. E. BRADENTON, FL	Board 2.00	0.	0.	0.
BEVERLY BEALL 1806 38TH AVE. E. BRADENTON, FL 34208	Board 2.00	0.	0.	0.
BETTY B. SZYMANSKI 1806 38TH AVE. E. BRADENTON, FL 34208	Board 2.00	0.	0.	0.
CLIFFORD L. WALTERS 1806 38TH AVE. E. BRADENTON, FL 34208	Board 2.00	0.	0.	0.

2 Compensation of five highest-paid employees (other than those included on line 1– see instructions). 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

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors *(continued)*

3 **Five highest-paid independent contractors for professional services – (see instructions). If none, enter 'NONE.'**

(a) Name and address of each person paid more than $50,000	(b) Type of service	(c) Compensation
None		
Total number of others receiving over $50,000 for professional services ►		0

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.	Expenses
1 SCHOLARSHIPS	63,642.
2 DONATIONS	35,150.
3	
4	

Part IX-B Summary of Program-Related Investments (see instructions)

Describe the two largest program-related investments made by the foundation during the tax year on lines 1 and 2.	Amount
1 N/A	
2	
All other program-related investments. See instructions. 3	
Total. Add lines 1 through 3 ►	0.

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	2,942,787.
b Average of monthly cash balances		1b	55,914.
c Fair market value of all other assets (see instructions)		1c	
d **Total** (add lines 1a, b, and c)		1d	2,998,701.
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	2,998,701.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)		4	44,981.
5 **Net value of noncharitable-use assets.** Subtract line 4 from line 3. Enter here and on Part V, line 4		5	2,953,720.
6 **Minimum investment return.** Enter 5% of line 5		6	147,686.

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	147,686.
2a Tax on investment income for 2009 from Part VI, line 5	2a 301.		
b Income tax for 2009. (This does not include the tax from Part VI.)	2b		
c Add lines 2a and 2b		2c	301.
3 Distributable amount before adjustments. Subtract line 2c from line 1		3	147,385.
4 Recoveries of amounts treated as qualifying distributions		4	
5 Add lines 3 and 4		5	147,385.
6 Deduction from distributable amount (see instructions)		6	
7 **Distributable amount** as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1		7	147,385.

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	164,116.
b Program-related investments – total from Part IX-B	1b	
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	164,116.
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 (see instructions)	5	301.
6 **Adjusted qualifying distributions.** Subtract line 5 from line 4	6	163,815.

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 2008	(c) 2008	(d) 2009
1 Distributable amount for 2009 from Part XI, line 7				147,385.
2 Undistributed income, if any, as of the end of 2009				
a Enter amount for 2008 only			0.	
b Total for prior years: 20___, 20___, 20___		0.		
3 Excess distributions carryover, if any, to 2009:				
a From 2004 81,352.				
b From 2005 31,259.				
c From 2006				
d From 2007				
e From 2008				
f **Total** of lines 3a through e	112,611.			
4 Qualifying distributions for 2009 from Part XII, line 4: ► $ 164,116.				
a Applied to 2008, but not more than line 2a			0.	
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 2009 distributable amount				147,385.
e Remaining amount distributed out of corpus	16,731.			
5 Excess distributions carryover applied to 2009 *(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	129,342.			
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 2008. Subtract line 4a from line 2a. Taxable amount – see instructions			0.	
f Undistributed income for 2009. Subtract lines 4d and 5 from line 1. This amount must be distributed in 2010				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (see instructions)	0.			
8 Excess distributions carryover from 2004 not applied on line 5 or line 7 (see instructions)	81,352.			
9 **Excess distributions carryover to 2010.** Subtract lines 7 and 8 from line 6a	47,990.			
10 Analysis of line 9:				
a Excess from 2005 31,259.				
b Excess from 2006				
c Excess from 2007				
d Excess from 2008				
e Excess from 2009 16,731.				

Part XIV Private Operating Foundations (see instructions and Part VII-A, question 9) N/A

1a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2009, enter the date of the ruling ▶

b Check box to indicate whether the foundation is a private operating foundation described in section ☐ 4942(j)(3) or ☐ 4942(j)(5)

	Tax year	Prior 3 years			
	(a) 2009	(b) 2008	(c) 2007	(d) 2006	(e) Total
2a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed					
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					
3 Complete 3a, b, or c for the alternative test relied upon:					
a 'Assets' alternative test – enter: (1) Value of all assets					
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)					
b 'Endowment' alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed					
c 'Support' alternative test – enter: (1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)					
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)					
(3) Largest amount of support from an exempt organization					
(4) Gross investment income					

Part XV Supplementary Information (Complete this part only if the organization had $5,000 or more in assets at any time during the year – see instructions.)

1 **Information Regarding Foundation Managers:**

a List any managers of the foundation who have contributed more than 2% of the total contributions received by the foundation before the close of any tax year (but only if they have contributed more than $5,000). (See section 507(d)(2).)

None

b List any managers of the foundation who own 10% or more of the stock of a corporation (or an equally large portion of the ownership of a partnership or other entity) of which the foundation has a 10% or greater interest.

None

2 **Information Regarding Contribution, Grant, Gift, Loan, Scholarship, etc, Programs:**

Check here ▶ ☐ if the foundation only makes contributions to preselected charitable organizations and does not accept unsolicited requests for funds. If the foundation makes gifts, grants, etc, (see instructions) to individuals or organizations under other conditions, complete items 2a, b, c, and d

a The name, address, and telephone number of the person to whom applications should be addressed:

See Statement 8

b The form in which applications should be submitted and information and materials they should include.

See Statement for Line 2a

c Any submission deadlines:

See Statement for Line 2a

d Any restrictions or limitations on awards, such as by geographical areas, charitable fields, kinds of institutions, or other factors:

See Statement for Line 2a

Part XV Supplementary Information (continued)

3 Grants and Contributions Paid During the Year or Approved for Future Payment

Recipient Name and address (home or business)	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
a *Paid during the year* See Statement 9				
Total			► **3a**	98,792.
b *Approved for future payment*				
Total			► **3b**	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.	Unrelated business income		Excluded by section 512, 513, or 514		
	(a) Business code	(b) Amount	(c) Exclu-sion code	(d) Amount	(e) Related or exempt function income (see the instructions)
1 Program service revenue:					
a					
b					
c					
d					
e					
f					
g Fees and contracts from government agencies					
2 Membership dues and assessments					
3 Interest on savings and temporary cash investments			14	27.	
4 Dividends and interest from securities			14	42,693.	
5 Net rental income or (loss) from real estate:					
a Debt-financed property					
b Not debt-financed property					
6 Net rental income or (loss) from personal property					
7 Other investment income					
8 Gain or (loss) from sales of assets other than inventory					-112,061.
9 Net income or (loss) from special events					
10 Gross profit or (loss) from sales of inventory					
11 Other revenue:					
a					
b					
c					
d					
e					
12 Subtotal. Add columns (b), (d), and (e)				42,720.	-112,061.
13 **Total.** Add line 12, columns (b), (d), and (e)				13	-69,341.

(See worksheet in the instructions for line 13 to verify calculations.)

Part XVI-B Relationship of Activities to the Accomplishment of Exempt Purposes

Line No. ▼	Explain below how each activity for which income is reported in column (e) of Part XVI-A contributed importantly to the accomplishment of the foundation's exempt purposes (other than by providing funds for such purposes). (See the instructions.)
N/A	

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	1a (1)		X
(2)	Other assets	1a (2)		X
b	Other transactions:		
(1)	Sales of assets to a noncharitable exempt organization	1b (1)		X
(2)	Purchases of assets from a noncharitable exempt organization	1b (2)		X
(3)	Rental of facilities, equipment, or other assets	1b (3)		X
(4)	Reimbursement arrangements	1b (4)		X
(5)	Loans or loan guarantees	1b (5)		X
(6)	Performance of services or membership or fundraising solicitations	1b (6)		X
c	Sharing of facilities, equipment, mailing lists, other assets, or paid employees	1c		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.

(a) Line no	(b) Amount involved	(c) Name of noncharitable exempt organization	(d) Description of transfers, transactions, and sharing arrangements
N/A			

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

SIGN HERE ► R M Beall — 4/7/10 ► Board of Trustee

Signature of officer or trustee — Date — Title

Paid Preparer's Use Only	Preparer's signature ► Self-Prepared	Date	Check if self-employed ► ☐	Preparer's Identifying number (See Signature in the instrs)
	Firm's name (or yours if self-employed), address, and ZIP code ►		EIN ►	
			Phone no ►	

R.M. BEALL SR. CHARITABLE FOUNDATION 59-2851924

Statement 1
Form 990-PF, Part I, Line 16b
Accounting Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
ACCOUNTING FEES	$ 9,500.			$ 9,500.
Total	$ 9,500.	$ 0.	$ 0.	$ 9,500.

Statement 2
Form 990-PF, Part I, Line 16c
Other Professional Fees

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
ADMINISTRATIVE ESPENSE	$ 54,649.			$ 54,649.
INVESTMENT FEES	12,643.	$ 12,643.		
Total	$ 67,292.	$ 12,643.	$ 0.	$ 54,649.

Statement 3
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
TAXES	$ 1,175.			$ 1,175.
Total	$ 1,175.	$ 0.	$ 0.	$ 1,175.

Statement 4
Form 990-PF, Part II, Line 10a
Investments - U.S. and State Government Obligations

U.S. Government Obligations	Valuation Method	Book Value	Fair Market Value
FEDERAL HOMELOAN MTG CORP	Cost	$ 0.	$ 0.
FEDERAL HOME LOAN BANK BONDS	Cost	50,271.	53,172.
		$ 50,271.	$ 53,172.
	Total	$ 50,271.	$ 53,172.

Ø's marked to delete next year. kept in current return for begin balance.

Statement 5
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
BEALL'S INC. STOCK	Cost	$ 1,869,516.	$ 1,414,233.
ALLIANZ FDS SMALL-CAP VALUE FD	Cost	34,752.	41,785.
DREYFUS FDS SMALL CAP EQTY	Cost	0.	0.
EATON VANCE TR TAX-MANAGED VALUE CL	Cost	347,099.	302,274.
FORUM FDS ABSOLUTE STRATEGIES FD	Cost	183,070.	193,520.
RIDGEWORTH FD-MIDCAP VAL EQUITY	Cost	29,000.	47,303.
RIDGEWORTH FD-LARGECAP CORE EQUITY	Cost	93,160.	123,141.
RIDGEWORTH FD-INTL EQUITY	Cost	162,142.	145,104.
T ROWE PRICE INSTL EQUITY FDS INC	Cost	154,687.	173,445.
SENTINEL FDS SMALL CO FD-I	Cost	16,000.	16,465.
	Total	$ 2,889,426.	$ 2,457,270.

Statement 6
Form 990-PF, Part II, Line 10c
Investments - Corporate Bonds

Corporate Bonds	Valuation Method	Book Value	Fair Market Value
EMERSON ELEC CO	Cost	$ 50,367.	$ 52,170.
GENERAL ELECTRIC CAP CORP	Cost	50,556.	52,835.
PROCTER & GAMBLE CO	Cost	0.	0.
WAL-MART STORES INC	Cost	0.	0.
ABBOTT LABS GLOBAL NTS	Cost	51,107.	53,032.
GENERAL DYNAMICS CORP GLOBAL NOTES	Cost	50,914.	51,290.
INTL BUSINESS MACHS BONDS	Cost	36,157.	37,602.
PEPSICO INC	Cost	50,715.	53,408.
PRAXAIR INC NTS	Cost	51,665.	52,723.
	Total	$ 341,481.	$ 353,060.

Statement 7
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

Item	(a) Description	(b) How Acquired	(c) Date Acquired	(d) Date Sold
1	14850.16 T ROWE PRICE INSTL EQTY LARGECAP GRT	Purchased	Various	2/04/2009
2	50000 WAL-MART STORES INC.	Purchased	Various	8/10/2009
3	50000 PROCTER & GAMBLE CO	Purchased	Various	9/15/2009
4	50000 FED HOME LN MTG CORP	Purchased	Various	10/02/2009
5	1550 ALLIANZ FDS NFJ SMALLCAP VALUE FD	Purchased	Various	10/13/2009
6	1300.76 DREYFUS BOSTON CO SMALLCAP EQTY TE	Purchased	Various	10/13/2009
7	2873 EATON VANCE TAX-MGD VAL-I-IBT	Purchased	Various	10/13/2009
8	1300 RIDGEWORTH FD-EMERGING GRWTH	Purchased	Various	11/18/2009

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i)-(j)	(l) Gain (Loss)
1	136,473.		240,958.	-104,485.				$-104,485.

Statement 7 (continued)
Form 990-PF, Part IV, Line 1
Capital Gains and Losses for Tax on Investment Income

Item	(e) Gross Sales	(f) Deprec. Allowed	(g) Cost Basis	(h) Gain (Loss)	(i) FMV 12/31/69	(j) Adj. Bas. 12/31/69	(k) Excess (i)-(j)	(l) Gain (Loss)
2	50,000.		49,586.	414.				$ 414.
3	50,000.		49,570.	430.				430.
4	50,000.		50,000.	0.				0.
5	36,875.		31,248.	5,627.				5,627.
6	38,672.		38,635.	37.				37.
7	43,957.		58,236.	-14,279.				-14,279.
8	13,260.		13,065.	195.				195.
							Total	$-112,061.

Statement 8
Form 990-PF, Part XV, Line 2a-d
Application Submission Information

Name of Grant Program:	
Name:	FOUNDATION ADMINISTRATOR
Care Of:	PATRICIA JOHNSON
Street Address:	1806 38TH AVE. EAST
City, State, Zip Code:	BRADENTON, FL 34208
Telephone:	
Form and Content:	PRESCRIBED APPLICATION FORM - SEE ATTACHED COPY
Submission Deadlines:	NONE
Restrictions on Awards:	SEE ATTACHED COPY

Statement 9
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found-ation Status	Purpose of Grant	Amount
Ashley Hoglund 601 Broad St. Box 240 LaGrange, GA 34436	Employee Dependent		SCHOLARSHIP	$ 2,500.
Catrina Ellis 1228 7th Ave S St.Petersburg, FL 33705	Employee Dependent		SCHOLARSHIP	2,500.
Cherise Latta 815 Indian River St. Box 3421 Boca Raton, FL 33431	Employee Dependent		SCHOLARSHIP	5,000.

Statement 9 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found-ation Status	Purpose of Grant	Amount
Jielaan Khlaaf 1540 Derringer Rd Jacksonville, FL 32225	Employee Dependent		SCHOLARSHIP	$ 2,500.
John Dickens PO Box 15872 Fernandina Beach, FL 32035	Employee Dependent		SCHOLARSHIP	2,500.
Teryn Lambart 71 Oakland Hills Pl Rotonda West, FL 33947	Employee Dependent		SCHOLARSHIP	5,000.
Hope Family Services 1201 8th Ave W Bradenton, FL 34205	NONE		DONATIONS	900.
Literacy Council of Manatee County United Way bldg, Suite 5, 1701 14th Bradenton, FL 34205	NONE		DONATIONS	250.
Manasota B.U.D.S. 8374 Market St. #113 Bradenton, FL 34202	NONE		DONATIONS	250.
USF Foundation, Inc. 4202 E. Fowler Ave. ALC 100 Tampa, FL 33620	NONE		DONATIONS	5,000.
University of Florida PO Box 117153 Gainesville, FL 32611	NONE		DONATIONS	2,500.
John Hoglund 6459 S.Old Floral City Rd Floral City, FL 34436	Employee Dependent		SCHOLARSHIP	2,500.
Andrea Ellis 2221 23rd Avenue South St Petersburg, FL 33712	Employee Dependent		SCHOLARSHIP	2,500.
Briana Frazier 16832 Beach Road Perry, FL 32348	Employee Dependent		SCHOLARSHIP	1,250.
Brittany Bondy 3577 Deerwood Trail Melbourne, FL 32934	Employee Dependent		SCHOLARSHIP	1,250.

Statement 9 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found-ation Status	Purpose of Grant	Amount
Chad Deskins 402 East Poinsettia Street Lakeland, FL 33803	Employee Dependent		SCHOLARSHIP	$ 1,142.
Heidi Khlaaf 1540 Derringer Road Jacksonville, FL 32225	Employee Dependent		SCHOLARSHIP	2,500.
Jenna Pincas 12574 Oak Run Court Boyton Beach, FL 33436	Employee Dependent		SCHOLARSHIP	5,000.
Morgan Carlton 356 Willow Lane Ellenton, FL 34222	Employee Dependent		SCHOLARSHIP	2,500.
Thomas Liggieri 13915 Newport Shores Drive Hudson, FL 34669	Employee Dependent		SCHOLARSHIP	5,000.
Just for Girls 936 14th St.W. Bradenton, FL 34205	NONE		DONATIONS	500.
Palmetto Youth Center 501 17th Street West Palmetto, FL 34221	NONE		DONATIONS	25,000.
Florida School Choice Fund 337 South Plant Avenue Tampa, FL 33606	NONE		DONATIONS	500.
Abigail Matthewson 5490 College Drive #26 Graceville, FL 32440	Employee Dependent		SCHOLARSHIP	2,500.
Ashley Clark 628 Sea View Drive Destin, FL 32541	Employee Dependent		SCHOLARSHIP	3,750.
Ashley Jacobs 1024 Grandeur Street Palm Bay, FL 32909	Employee Dependent		SCHOLARSHIP	2,500.
Corey Daharsh 6482 Harold Avenue Cocoa, FL 32927	Employee Dependent		SCHOLARSHIP	1,250.
Dominique Walker 304 25th Street East Palmetto, FL 34221	Employee Dependent		SCHOLARSHIP	2,500.

Statement 9 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

Name and Address	Donee Relationship	Found-ation Status	Purpose of Grant	Amount
Jared Freeman 463 Louis Ed. Court Lakeland, FL 33809	Employee Dependent		SCHOLARSHIP	$ 1,250.
Nicolas Peters 217 Howey Road Sebring, FL 33872	Employee Dependent		SCHOLARSHIP	1,250.
Randee Pitkin 11057 Valencia Avenue Seminole, FL 33772	Employee Dependent		SCHOLARSHIP	5,000.
Zeta Phi Beta Sorority, Inc. PO Box 1255 Palmetto, FL 34220	NONE		DONATIONS	250.
			Total	$ 98,792.

BEALL'S FOUNDATIONS
R.M. Beall, Sr. Charitable Foundation
R.M. Beall, Sr. Charitable Operating Foundation
Robert and Aldona Beall Family Foundation

P.O. Box 25207
Bradenton, FL 34206-5207
941.744.4455 (Phone)
941.747.0857 (Fax)
foundations@beallsinc.com

Palmetto Youth Center Scholarship Program

Sponsored by
Beall's Foundations

The Palmetto Youth Center scholarship program, sponsored by the Beall's Foundations, is designed to give students with the will and ability, an opportunity to make the most of their educational career. The purpose is to ensure young people that have participated in the Palmetto Youth Center and have demonstrated drive and ability are able to take full advantage of their high school and college experience and earn an academic degree/diploma within four years.

Scholarship Rules

Selection Criteria

Selection will be determined based on the following factors:

- Extent of involvement with the Palmetto Youth Center
- Academic achievement
- Involvement in extracurricular activities
- Financial need
- Correctly completed scholarship application and accompanying information
- Interview with the Palmetto Youth Center Scholarship Committee

Description of Scholarship Program and Benefits

Each year the Beall's Foundations may select students to receive a scholarship award. The Trustees of the Foundation may award up to $2,500 (per year) to help fund college education for the first two years and up to $5,000 for years three and four. The scholarship can be used for room and board, tuition, fees, and books.

Any interested student can request a Scholarship Application Form from the Foundation or from the Palmetto Youth Center. The form must be submitted by the deadline determined by the Palmetto Youth Center to be considered. A decision will be made in April or May.

Eligibility Requirements for a Foundation Scholarship

Applicant must:

- Be a member of the Palmetto Youth Center
- Have a minimum of 2.5 GPA (A=4.0)
- Be formally accepted to a Florida Secondary, two-year or four-year accredited institution

Completed applications should be returned to:

Scholarship Committee Chairperson
Palmetto Youth Center
PO Box 608
Palmetto, FL 34220

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Qualifications for Continuing Eligibility of a Foundation Scholarship

1. Recipients will be at risk of losing the scholarship if they fail to maintain at least a 2.5 (A=4.0) GPA each semester and overall. Demonstrated effort as well as the difficulty of school and major will be considered.

2. Suspension or expulsion will automatically terminate scholarship assistance.

3. Convictions in court of law may terminate scholarship assistance.

4. The student must maintain a full course load (generally 12 hours) as specified by the school recipient is attending.

5. The student must have official transcripts sent directly from the school to Beall's Foundations at the end of each grading period.

6. The student must send a copy of their new class schedule for the next grading period to Beall's Foundations.

7. The student must volunteer at minimum of 10 hours at the Palmetto Youth Center annually. The volunteer hours must be performed during the period August – July of each year. If the student does not fulfill the minimum requirement, they may lose their scholarship funding.

8. The student must attend the Annual Martin Luther King banquet sponsored by the Palmetto Youth Center. The banquet is held in January of each year.

9. The student must attend mandatory Scholarship Retreats that will be held twice a year.

10. During June and December of each year that the student is eligible and wants to continue receiving the scholarship for the next academic year, he or she must complete the scholarship certification form. This form details scholarship eligibility requirements, due dates, and other pertinent information. In addition to completing the form, the following must be attached:

    - Official Transcript
    - Financial Aid Award Letter or Summary
    - Class Registration Schedule
    - College Acceptance Letter (new students)

While it is the intent of the Foundations is to continue the funding of qualified recipients for four years, this is not guaranteed and is at the discretion of the Foundation and the availability of funds. Additionally, the Palmetto Youth Center Scholarship Committee will evaluate the program annually and may make changes to program at that time.

Mentor Program

The mentor program was designed to provide an opportunity for constructive dialogue and sharing of wisdom that will enhance the student's ability to have a successful college career. Below are guidelines for the program:

- Each student will be assigned a mentor of the same gender.
- The mentor and student should meet before and after each grading period. Frequent meetings should help develop a rapport between the student and the mentor. The mentor should discuss the student's class schedule including number of classes the student is taking, grades, etc.
- The student is required to inform mentor any time there is a schedule or major subject change.
- Mentors should make a student status report to the board after each grading period.

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Acknowledgment

I acknowledge that I have read the above scholarship rules and will abide by them. I understand that if I do not comply with the rules my scholarship assistance may be terminated.

_____ _____
Applicant Date

_____ _____
Parent(s) or Guardian(s) of Applicant Date

NOTE: Copies of the signed acknowledgement form should be given to the student and the Palmetto Youth Center Chairperson. The original document will be placed in the student's scholarship file maintained by the Foundation Administrator.

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Palmetto Youth Center Scholarship Program

Sponsored by
Beall's Foundations

Scholarship Application

Name: _____
Last, First, Middle

Address: _____
Street or Box Number

_____
City, State, Zip Code

Home Phone #: _____

Social Security #: _____

Date of Birth: _____

Required Information

1. Please provide a one-page summary stating why you wish to attend school (high school or college) and why you need financial assistance.
2. Please provide a transcript of your high school and, if applicable, college scholastic record.
3. Please indicate the school you plan to attend. _____
4. Please indicate the major course of study you will be pursuing. _____
5. Please list other assistance applied for and status: _____

_____

_____

6. Please list extracurricular activities: _____

_____

_____

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7. Please list activities as a member of the Palmetto Youth Center: _____

_____

_____

_____

Family Information

1. Parent/Guardian employed by Beall's: _____
(If applicable) Last, First, Middle Date of Hire

2. Ages of dependent children in your family besides yourself: _____

_____

3. Father (or Legal Guardian's Name: _____
Mother's Name: _____

4. Father or Legal Guardian's Gross Income:* _____
Mother's Gross Income:* _____

5. Father or Legal Guardian's Employer & Address: Mother's Employer & Address:

_____ _____

_____ _____

_____ _____

*If you live in a single parent household, please indicate if financial support is not provided by parent.

_____

Education

1. Schools Attended:

Elementary School: _____ Dates: _____

High School: _____ Dates: _____ GPA: _____

College: _____ Dates: _____ GPA: _____

_____

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Work History

1. Current Job: Average Hours Worked: _____

Company Name: _____ Address: _____

Phone Number: _____ Supervisor: _____

From Month/Year	To Month/Year	Position Title	Salary Start/End

Brief description of duties: _____

_____

2. Previous job: Average Hours Worked: _____

Company Name: _____ Address: _____

Phone Number: _____ Supervisor: _____

From Month/Year	To Month/Year	Position Title	Salary Start/End

Brief description of duties: _____

_____

References

List two character references not related to you – teachers, club/team leaders, employers or religious leaders.

a. _____
Name Relationship

_____
Street or Box Number

_____
City, State, Zip Code

b. _____
Name Relationship

_____
Street or Box Number

_____
City, State, Zip Code

BEALL'S FOUNDATIONS
R.M. Beall, Sr. Charitable Foundation
R.M. Beall, Sr. Charitable Operating Foundation
Robert and Aldona Beall Family Foundation

P.O. Box 25207
Bradenton, FL 34206-5207
941.744.4455 (Phone)
941.747.0857 (Fax)
foundations@beallsinc.com

Have you been convicted of any offense within the last five years? o Yes o No

If your answer is "yes," on a separate sheet of paper explain the details and indicate when, where and disposition of the case.

I certify that I have not knowingly withheld any facts of circumstances in completing this application and it is further agreed that any misrepresentation by me in this application will be sufficient cause for rejecting the application. I authorize The Beall's Foundations to conduct an investigation of the contents of this application and will not hold anyone liable who supplies information.

Student's Signature _____ Date _____

Parent/Guardian Signature _____ Date _____

Return the fully completed application and accompanying information to:

Scholarship Committee Chairperson
Palmetto Youth Center
PO Box 608
Palmetto, FL 34220

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SCHOLARSHIP APPLICATION - EMPLOYEES

Name: _____ (Last / First / Middle)

Address: _____ (Street or Box Number)

_____ (City / State / Zip)

Birth date: _____

Local Phone #: _____

Social Security #: _____

Email Address: _____

Present Age: _____

Required Information

1. Please provide a one-page summary stating why you wish to attend college and why you need financial assistance.
2. Please provide a transcript of your high school and, if applicable, college scholastic record.
3. Please indicate the school you plan to attend. _____
4. Please indicate the major course of study you will be pursuing. _____
5. Please list other assistance applied for and status: _____

_____

6. Please list extracurricular activities: _____

_____

Family Information:

1. Parent/Guardian employed by Beall's: _____ (Name) _____ (Date of Hire)

_____ (Employee #) _____ (Relationship) _____ (Store Number/Department/Title)

2. Number and ages of dependent children in your family besides yourself: _____
3. Father's Name: _____ Mother's Name: _____
4. *Father's Annual Gross Income**: _____ *Mother's Annual Gross Income** _____
5. Father's Employer & Address: _____ Mother's Employer & Address: _____
6. I am the first to go to college in my family ☐ Yes ☐ No

*If you live in a single parent household, please indicate if parent does not provide financial support.
**Gross income is income before taxes and other deductions

Education

Schools attended:

High School _____ Dates: _____ GPA: _____

College: _____ Dates: _____ GPA: _____

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SCHOLARSHIP APPLICATION – EMPLOYEES, continued

Work History

Current Job:

Average Hours Worked: _____

Name: _____ Address: _____

Phone#: _____ Supervisor: _____

From Month/Year	To Month/Year	Position Title	Salary Start/End	

Brief description of duties: _____

_____

Previous Job:

Average Hours Worked: _____

Name: _____ Address: _____

Phone#: _____ Supervisor: _____

From Month/Year	To Month/Year	Position Title	Salary Start/End	

Brief description of duties: _____

_____

References

List two character references not related to you - teachers, club/team leaders, employers or religious leaders. (Reference letters are attached.)

a. _____
Name Relationship

_____
Street or Box Number

_____
City State Zip

b. _____
Name Relationship

_____
Street or Box Number

_____
City State Zip

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SCHOLARSHIP APPLICATION – EMPLOYEES, continued

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Student's Signature _____ Parent/Guardian Signature _____ Date _____

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REFERENCE

_____
Date

_____
Name

_____
Address

_____
Address

Dear _____:

_____**(Student)** has given your name as a reference in applying for a college scholarship. We would appreciate your assistance in our selection process by answering a few questions and returning this letter to us at the following address:

R.M. Beall, Sr. Charitable Foundation
1806 38th Avenue E.
Bradenton, FL 34208

Thank you very much.

Sincerely,
Patricia A. Johnson

R.M. BEALL, SR. CHARITABLE FOUNDATION
Patricia A. Johnson
Charitable Foundation Administrator

How long have you known the student? _____

In what capacity? _____

What, in your opinion, is his/her capacity for academic success in college?

Excellent ____ Moderate ____ Poor ____ Don't know ____

How well do his/her accomplishments match his/her ability?

- Works unusually hard to achieve ____
- Achievement generally reflects ability ____
- Tends to underachieve ____
- Don't know ____

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REFERENCE – Page 2

How would you rate his/her integrity?

High ___ Moderate ___ Low ___ Don't know ___

Do you recommend him/her for a scholarship?

Yes, strongly ___ Yes, with some reservations ___ No ___

Additional Remarks:

_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____
_____

I hereby certify that the information I have provided on these pages is accurate and true.

Signature: _____ Date: _____

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REFERENCE – Page 2

How would you rate his/her integrity?

High ___ Moderate ___ Low ___ Don't know ___

Do you recommend him/her for a scholarship?

Yes, strongly ___ Yes, with some reservations ___ No ___

Additional Remarks:

I hereby certify that the information I have provided on these pages is accurate and true.

Signature: _____ Date: _____