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

OMB No 1545-0052

2010

Department of the Treasury
Internal Revenue Service

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

For calendar year 2010, or tax year beginning , 2010, and ending

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

\$ 4,101,183.

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)

52,613.

2 Cl ☐ if the foundn is not req to att Sch B

3 Interest on savings and temporary cash investments

125.

125.

125.

4 Dividends and interest from securities

87,260.

87,260.

87,260.

5a Gross rents
b Net rental income or (loss)

6a Net gain/(loss) from sale of assets not on line 10

537,311.

b Gross sales price for all assets on line 6a 5,775,539.

7 Capital gain net income (from Part IV, line 2)

537,311.

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

677,309.

624,696.

87,385.

13 Compensation of officers, directors, trustees, etc

58,551.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule) See St 1

2,157.

2,157.

b Accounting fees (attach sch) See St 2

14,000.

14,000.

c Other prof fees (attach sch) See St 3

21,881.

21,881.

17 Interest

18 Taxes (attach schedule)(see instr) See Stm 4

301.

301.

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

96,890.

21,881.

16,458.

25 Contributions, gifts, grants paid Part XV

209,401.

209,401.

26 Total expenses and disbursements. Add lines 24 and 25

306,291.

21,881.

0.

225,859.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

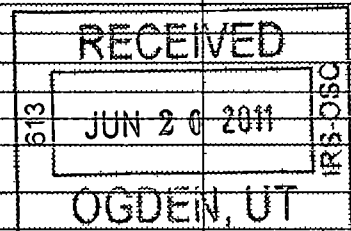
371,018.

b Net investment income (if negative, enter -0-)

602,815.

c Adjusted net income (if negative, enter -0-)

87,385.



Part II Balance Sheets		Beginning of year	End of year	
			(a) Book Value	(b) Book Value
ASSETS	1 Cash — non-interest-bearing	-12,703.	39,125.	39,125.
	2 Savings and temporary cash investments	424,178.	519,253.	519,253.
	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)	50,271.		
	b Investments — corporate stock (attach schedule) Statement 5	2,889,426.	2,308,682.	2,334,893.
	c Investments — corporate bonds (attach schedule) Statement 6	341,481.	1,200,000.	1,207,801.
	11 Investments — land, buildings, and equipment: basis			
LIABILITIES	Less: accumulated depreciation (attach schedule)			
	12 Investments — mortgage loans			
	13 Investments — other (attach schedule) Statement 7		111.	111.
	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)	3,692,653.	4,067,171.	4,101,183.
	17 Accounts payable and accrued expenses	3,500.	7,000.	
	18 Grants payable			
	19 Deferred revenue			
NET ASSETS OR FUND BALANCES	20 Loans from officers, directors, trustees, & other disqualified persons			
	21 Mortgages and other notes payable (attach schedule)			
	22 Other liabilities (describe)			
	23 Total liabilities (add lines 17 through 22)	3,500.	7,000.	
	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.			
NET ASSETS OR FUND BALANCES	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	3,689,153.	4,060,171.	
	28 Paid-in or capital surplus, or land, building, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
NET ASSETS OR FUND BALANCES	30 Total net assets or fund balances (see the instructions)	3,689,153.	4,060,171.	
	31 Total liabilities and net assets/fund balances (see the instructions)	3,692,653.	4,067,171.	

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	3,689,153.
2	Enter amount from Part I, line 27a	2	371,018.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	4,060,171.
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	4,060,171.

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 8				
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	537,311.
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))
2009	163,815.	2,953,720.	0.055461
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

2 Total of line 1, column (d)	2	0.210555
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	0.042111
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	3,859,288.
5 Multiply line 4 by line 3	5	162,518.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	6,028.
7 Add lines 5 and 6	7	168,546.
8 Enter qualifying distributions from Part XII, line 4	8	225,859.

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)

1 a 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.)		1	6,028.
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☒ 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, 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	6,028.
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	6,028.
6 Credits/Payments			
a 2010 estimated tax pmts and 2009 overpayment credited to 2010	6a		
b Exempt foreign organizations — tax withheld at source	6b		
c Tax paid with application for extension of time to file (Form 8868)	6c	6,028.	
d Backup withholding erroneously withheld	6d		
7 Total credits and payments. Add lines 6a through 6d	7	6,028.	
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	0.	
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 2011 estimated tax ☐ Refunded ☐	11		

Part VII-A Statements Regarding Activities

	Yes	No
1 a 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
b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see the instructions for definition)? <i>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</i>		X
c 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 ☐ \$ 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? <i>If 'Yes,' attach a detailed description of the activities.</i>		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? <i>If 'Yes,' attach a conformed copy of the changes</i>		X
4 a 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?		N/A
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? <i>If 'Yes,' attach the statement required by General Instruction T</i>		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? <i>If 'Yes,' complete Part II, column (c), and Part XIV</i>	X	
8 a 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? <i>If 'No,' attach explanation</i>	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 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? <i>If 'Yes,' complete Part XIV</i>		X
10 Did any persons become substantial contributors during the tax year? <i>If 'Yes,' attach a schedule listing their names and addresses</i>		X

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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 <u>N/A</u>	13	X	
14	The books are in care of <u>MICHAEL MADDALONI</u> Telephone no <u>(941) 747-2355</u> Located at <u>1806 38TH AVE. EAST BRADENTON FL</u> ZIP + 4 <u>34208</u>			
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 <u>N/A</u>	15		N/A
16	At any time during calendar year 2010, did the foundation have an interest in or a signature or other authority over a bank, securities, or other financial account in a foreign country? See the instructions for exceptions and filing requirements for Form TD F 90-22.1 If 'Yes,' enter the name of the foreign country <u></u>	16	Yes	No
				X

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)? Organizations relying on a current notice regarding disaster assistance check here <u></u>		1b	X
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 2010?		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 2010, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2010? If 'Yes,' list the years <u>20__ , 20__ , 20__ , 20__</u>	☐ Yes ☒ 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 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. <u>20__ , 20__ , 20__ , 20__</u>			
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 2010 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 2010.)		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 2010?		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)? (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

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 34208	Board 2.00	0.	0.	0.
BEVERLY BEALL 1806 38TH AVE. E. BRADENTON, FL 34208	Board 28.00	58,551.	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	
	106,040.
2 DONATIONS	
	103,361.
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.

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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	3,721,565.
b Average of monthly cash balances	1b	196,494.
c Fair market value of all other assets (see instructions)	1c	
d Total (add lines 1a, b, and c)	1d	3,918,059.
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	3,918,059.
4 Cash deemed held for charitable activities. Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	58,771.
5 Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	3,859,288.
6 Minimum investment return. Enter 5% of line 5	6	192,964.

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	192,964.
2a Tax on investment income for 2010 from Part VI, line 5	2a	6,028.	
b Income tax for 2010 (This does not include the tax from Part VI)	2b		
c Add lines 2a and 2b		2c	6,028.
3 Distributable amount before adjustments. Subtract line 2c from line 1		3	186,936.
4 Recoveries of amounts treated as qualifying distributions		4	
5 Add lines 3 and 4		5	186,936.
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	186,936.

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	225,859.
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	225,859.
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	6,028.
6 Adjusted qualifying distributions. Subtract line 5 from line 4	6	219,831.

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.

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Part XIII Undistributed Income (see instructions)

	(a) Corpus	(b) Years prior to 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				186,936.
2 Undistributed income, if any, as of the end of 2010:				
a Enter amount for 2009 only			0.	
b Total for prior years: 20____, 20____, 20____		0.		
3 Excess distributions carryover, if any, to 2010:				
a From 2005	31,259.			
b From 2006				
c From 2007				
d From 2008	.			
e From 2009	16,731.			
f Total of lines 3a through e	47,990.			
4 Qualifying distributions for 2010 from Part XII, line 4. ► \$ 225,859.				
a Applied to 2009, 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 2010 distributable amount				186,936.
e Remaining amount distributed out of corpus	38,923.			
5 Excess distributions carryover applied to 2010. (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	86,913.			
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 2009 Subtract line 4a from line 2a Taxable amount — see instructions			0.	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1. This amount must be distributed in 2011				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 2005 not applied on line 5 or line 7 (see instructions)	31,259.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	55,654.			
10 Analysis of line 9				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009	16,731.			
e Excess from 2010	38,923.			

BAA

Form 990-PF (2010)

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 2010, 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)

- 2a** Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed

[illegible]

- 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(i)(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 9

- 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 <i>Paid during the year</i> See Statement 10				
Total			3a	209,401.
b <i>Approved for future payment</i>				
Total			3b	

Part XVI-A Analysis of Income-Producing Activities

Enter gross amounts unless otherwise indicated.

Enter gross amounts unless otherwise indicated.		Unrelated business income		Excluded by section 512, 513, or 514		(e) Related or exempt function income (see the instructions)
		(a) Business code	(b) Amount	(c) Exclu- sion code	(d) Amount	
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	125.	
4	Dividends and interest from securities			14	87,260.	
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			18	197,948.	339,363.
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)				285,333.	339,363.
13	Total. Add line 12, columns (b), (d), and (e)				13	624,696.

(See worksheet in line 13 instructions to verify calculations)

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

[illegible]

Schedule B
(Form 990, 990-EZ,
or 990-PF)

Department of the Treasury
Internal Revenue Service

Schedule of Contributors

► Attach to Form 990, 990-EZ, or 990-PF

OMB No 1545-0047

2010

Name of the organization

R.M. BEALL SR. CHARITABLE FOUNDATION

Employer identification number

59-2851924

Organization type (check one).

Filers of:

Form 990 or 990-EZ

Section:

- ☐ 501(c)(____) (enter number) organization
☐ 4947(a)(1) nonexempt charitable trust **not** treated as a private foundation
☐ 527 political organization

Form 990-PF

- ☒ 501(c)(3) exempt private foundation
☐ 4947(a)(1) nonexempt charitable trust treated as a private foundation
☐ 501(c)(3) taxable private foundation

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

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

General Rule

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

Special Rules

- ☐ For a section 501(c)(3) organization filing Form 990 or 990-EZ, that met the 33-1/3% support test of the regulations under sections 509(a)(1) and 170(b)(1)(A)(vi), and received from any one contributor, during the year, a contribution of the greater of (1) \$5,000 or (2) 2% of the amount on (i) Form 990, Part VIII, line 1h or (ii) Form 990-EZ, line 1. Complete Parts I and II.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year, aggregate contributions of more than \$1,000 for use *exclusively* for religious, charitable, scientific, literary, or educational purposes, or the prevention of cruelty to children or animals. Complete Parts I, II, and III.
- ☐ For a section 501(c)(7), (8), or (10) organization filing Form 990 or 990-EZ, that received from any one contributor, during the year, contributions for use *exclusively* for religious, charitable, etc., purposes, but these contributions did not aggregate to more than \$1,000. If this box is checked, enter here the total contributions that were received during the year for an *exclusively* religious, charitable, etc., purpose. Do not complete any of the parts unless the **General Rule** applies to this organization because it received nonexclusively religious, charitable, etc., contributions of \$5,000 or more during the year. ► \$ _____

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

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

Schedule B (Form 990, 990-EZ, or 990-PF) (2010)

Name of organization

R.M. BEALL SR. CHARITABLE FOUNDATION

Employer identification number

59-2851924

Part I Contributors (see instructions)

(a) Number	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	BEALL'S, INC. 1806 38TH AVE E. BRADENTON, FL 34208	\$ 43,282.	Person ☒ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)
			Person ☐ Payroll ☐ Noncash ☐ (Complete Part II if there is a noncash contribution.)

Employer identification number

59-2851924

Part II

(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
	N/A	\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	
(a) No. from Part I	(b) Description of noncash property given	(c) FMV (or estimate) (see instructions)	(d) Date received
		\$	

Schedule B (Form 990, 990-EZ, or 990-PF) (2010)

Name of organization

Employer identification number

R.M. BEALL SR. CHARITABLE FOUNDATION

59-2851924

Part III Exclusively religious, charitable, etc., individual contributions to section 501(c)(7), (8), or (10) organizations aggregating more than \$1,000 for the year. Complete cols (a) through (e) and the following line entry.For organizations completing Part III, enter total of *exclusively* religious, charitable, etc., contributions of **\$1,000 or less** for the year. (Enter this information once See instructions)

► \$ N/A

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	N/A		
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee
	(e) Transfer of gift		
	Transferee's name, address, and ZIP + 4		Relationship of transferor to transferee

BAA

R.M. BEALL SR. CHARITABLE FOUNDATION

59-2851924

Statement 1
Form 990-PF, Part I, Line 16a
Legal Fees

	(a) Expenses Per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
Bank Fees	\$ 118.			\$ 118.
Legal Expense	2,039.			2,039.
Total	<u>\$ 2,157.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 2,157.</u>

Statement 2
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	\$ 14,000.			\$ 14,000.
Total	<u>\$ 14,000.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 14,000.</u>

Statement 3
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
INVESTMENT FEES	\$ 21,881.	\$ 21,881.		
Total	<u>\$ 21,881.</u>	<u>\$ 21,881.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>

Statement 4
Form 990-PF, Part I, Line 18
Taxes

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
TAXES	\$ 301.			\$ 301.
Total	<u>\$ 301.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 301.</u>

R.M. BEALL SR. CHARITABLE FOUNDATION

59-2851924

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	\$ 0.	\$ 0.
ALLIANZ FDS SMALL-CAP VALUE FD	Cost	0.	0.
EATON VANCE TR TAX-MANAGED VALUE CL	Cost	0.	0.
FORUM FDS ABSOLUTE STRATEGIES FD	Cost	0.	0.
RIDGEWORTH FD-MIDCAP VAL EQUITY	Cost	0.	0.
RIDGEWORTH FD-LARGCAP CORE EQUITY	Cost	0.	0.
RIDGEWORTH FD-INTL EQUITY	Cost	0.	0.
T ROWE PRICE INSTL EQUITY FDS INC	Cost	0.	0.
SENTINEL FDS SMALL CO FD-I	Cost	0.	0.
ARTISAN FDS INTL VALUE FD	Cost	279,000.	283,284.
ASTON FDS ASTON/RIVER RD	Cost	120,000.	120,992.
DFA INVT DIMENSIONS GROUP US CORE	Cost	319,000.	326,439.
DFA INVT DIMENSIONS GROUP EMERGING MKTS	Cost	279,000.	291,579.
FIRST EAGLE FDS GOLD FD	Cost	100,000.	94,860.
FIRST PACIFIC ADVISORS FDS CRESCENT	Cost	200,000.	199,182.
HUSSMAN INVT TR STRATEGIC GROWTH	Cost	160,000.	156,312.
IVA FIDUCIARY TR IVA WORLDWIDE FD	Cost	400,000.	392,949.
PIMCO FDS COMMODITY REALRETURN	Cost	92,682.	104,774.
SCHWAB CAP TR HEDGED EQUITY FD	Cost	239,000.	240,738.
UNIFIED SER TR AUER GROWTH FD	Cost	120,000.	123,784.
Total		\$ 2,308,682.	\$ 2,334,893.

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	\$ 0.	\$ 0.
GENERAL ELECTRIC CAP CORP	Cost	0.	0.
ABBOTT LABS GLOBAL NTS	Cost	0.	0.
GENERAL DYNAMICS CORP GLOBAL NOTES	Cost	0.	0.
INTL BUSINESS MACHS BONDS	Cost	0.	0.
PEPSICO INC	Cost	0.	0.
PRAXAIR INC NTS	Cost	0.	0.
NORTHERN LTS FD TR ALTEGRIS	Cost	200,000.	207,122.
TEMPLETON INCOME TR GLOBAL BD	Cost	200,000.	198,973.
VANGUARD BD INDEX FD TOTAL BD MKT	Cost	400,000.	401,135.
VANGUARD FIXED INCOME SECS FDS INFLATION	Cost	200,000.	200,385.
VANGUARD FIXED INCOME SECS FDS ST	Cost	200,000.	200,186.
Total		\$ 1,200,000.	\$ 1,207,801.

R.M. BEALL SR. CHARITABLE FOUNDATION

59-2851924

Statement 7
Form 990-PF, Part II, Line 13
Investments - Other

	Valuation Method	Book Value	Fair Market Value
<u>Other Investments</u>			
Distribution - Not Reinvested	Cost	\$ 111.	\$ 111.
	Total	\$ 111.	\$ 111.

Statement 8
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	12864.102 EATON VANCE TAX-MGD VAL-1 #35572	Purchased	Various	12/09/2010
2	50000 FED HOME LN BK 5.375% 6/10/11	Purchased	Various	12/09/2010
3	18518.701 FORUM ABSOLUTE STRATEGIES	Purchased	Various	12/09/2010
4	17705.377 T ROWE PRICE INSTL LARGE-CAP GRWTH	Purchased	Various	12/09/2010
5	5185.405 JANUS PERKINS SMALL CAP VALUE	Purchased	Various	12/09/2010
6	19576.813 MANNING & NAPIER WORLD OPPTYS-A	Purchased	Various	12/09/2010
7	2409.912 OPPENHEIMER DEVELOPING MKTS INSTL-Y	Purchased	Various	12/09/2010
8	15053.103 RIDGEWORTH FD-MIDCAP VAL EQTY #RGD5	Purchased	Various	12/09/2010
9	30263.67 RIDGEWORTH FD-LARGECAP VAL EQTY #RGD4	Purchased	Various	12/09/2010
10	32240.919 RIDGEWORTH FD-LARGECAP GRTH STK#RGE3	Purchased	Various	12/09/2010
11	11018.112 RIDGEWORTH FD-INTL EQTY INDEX #RGD8	Purchased	Various	12/09/2010
12	6921.508 RIDGEWORTH FD-INTL 130/30 #RGD1	Purchased	Various	12/09/2010
13	27057.341 RIDGEWORTH FD-US GOV SEC ULTRA #RGDW	Purchased	Various	12/09/2010
14	27521.493 RIDGEWORTH FD-ULTRA-SHORT BD #RGCY	Purchased	Various	12/09/2010
15	17522.738 SENTINEL SMALL CO-I	Purchased	Various	12/09/2010
16	50000 ABBOTT LABS 5.600% 5/15/11	Purchased	Various	12/09/2010
17	50000 GENERAL ELEC CAP 6.125% 2/22/11	Purchased	Various	12/09/2010
18	35000 INTL BUSINESS MACH 4.750% 11/29/12	Purchased	Various	12/09/2010
19	50000 PEPSICO INC 4.650% 2/15/13	Purchased	Various	12/09/2010
20	50000 PRAXAIR INC 4.375% 3/31/14	Purchased	Various	12/09/2010
21	219943 SHARES OF BEALL'S INC. STOCK	Donated	Various	1/31/2010
22	1723.809 ALLIANZ FDS NFJ SMALLCAP VALUE FD	Purchased	Various	2/12/2010
23	6537.308 EATON VANCE TAX-MGD VAL-I-IBT #35572	Purchased	Various	2/12/2010
24	9843.44 RIDGEWORTH FD-LARGECAP CORE. EQTY#983	Purchased	Various	2/12/2010
25	13753.942 RIDGEWORTH FD-INTL EQ #540	Purchased	Various	2/12/2010
26	3311.905 T ROWE PRICE REAL ESTATE SHS	Purchased	Various	6/02/2010
27	50000 EMERSON ELEC CO 7.125% 08/15/10	Purchased	Various	8/15/2010
28	50000 GENERAL DYNAMICS 4.500% 8/15/10	Purchased	Various	8/15/2010

R.M. BEALL SR. CHARITABLE FOUNDATION

59-2851924

Statement 8 (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)
1	214,187.		214,587.	-400.				\$ -400.
2	51,050.		50,271.	779.				779.
3	200,743.		183,070.	17,673.				17,673.
4	287,889.		227,338.	60,551.				60,551.
5	126,109.		108,012.	18,097.				18,097.
6	169,339.		151,133.	18,206.				18,206.
7	83,672.		64,682.	18,990.				18,990.
8	185,003.		132,402.	52,601.				52,601.
9	380,112.		323,216.	56,896.				56,896.
10	345,945.		280,496.	65,449.				65,449.
11	143,897.		129,573.	14,324.				14,324.
12	49,904.		43,121.	6,783.				6,783.
13	272,197.		272,738.	-541.				-541.
14	273,288.		272,738.	550.				550.
15	135,451.		108,167.	27,284.				27,284.
16	51,014.		51,107.	-93.				-93.
17	50,493.		50,556.	-63.				-63.
18	37,541.		36,157.	1,384.				1,384.
19	53,789.		50,716.	3,073.				3,073.
20	53,575.		51,665.	1,910.				1,910.
21	2067464.		1869516.	197,948.				197,948.
22	41,199.		34,752.	6,447.				6,447.
23	98,125.		132,511.	-34,386.				-34,386.
24	118,909.		93,160.	25,749.				25,749.
25	133,276.		162,142.	-28,866.				-28,866.
26	51,368.		43,121.	8,247.				8,247.
27	50,000.		50,367.	-367.				-367.
28	50,000.		50,914.	-914.				-914.
Total								\$ 537,311.

Statement 9
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

R.M. BEALL SR. CHARITABLE FOUNDATION

59-2851924

Statement 10
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Cherise Latta 815 Indian River St. Box 3421 Boca Raton, FL 33431	Employee Dependent		SCHOLARSHIP	\$ 417.
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	3,125.
Teryn Lambart 71 Oakland Hills Pl Rotonda West, FL 33947	Employee Dependent		SCHOLARSHIP	5,000.
Just for Girls 936 14th St.W. Bradenton, FL 34205	NONE		DONATIONS	1,000.
Hope Family Services 1201 8th Ave W Bradenton, FL 34205	NONE		DONATIONS	1,000.
Junior Achievement 15201 Roosevelt Blvd., Suite 112 Clearwater, FL 33760	NONE		DONATIONS	250.
Andrea Ellis 2221 23rd Avenue South St Petersburg, FL 33712	Employee Dependent		SCHOLARSHIP	2,500.
Ashlie Odom 4369 Bayou Ridge Drive Pace, FL 32571	Employee Dependent		SCHOLARSHIP	1,250.
Briana Frazier 16832 Beach Road Perry, FL 32348	Employee Dependent		SCHOLARSHIP	6,250.
Brittany Bondy 3577 Deerwood Trail Melbourne, FL 32934	Employee Dependent		SCHOLARSHIP	1,250.
Chad Deskins 402 East Poinsettia Street Lakeland, FL 33803	Employee Dependent		SCHOLARSHIP	2,500.

R.M. BEALL SR. CHARITABLE FOUNDATION

59-2851924

Statement 10 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Heidi Khlaaf 1540 Derringer Road Jacksonville, FL 32225	Employee Dependent		SCHOLARSHIP	\$ 5,000.
Jenna Pincas 12574 Oak Run Court Boyton Beach, FL 33436	Employee Dependent		SCHOLARSHIP	2,500.
Morgan Carlton 356 Willow Lane Ellenton, FL 34222	Employee Dependent		SCHOLARSHIP	7,500.
Thomas Liggieri 13915 Newport Shores Drive Hudson, FL 34669	Employee Dependent		SCHOLARSHIP	5,000.
Palmetto Youth Center 501 17th Street West Palmetto, FL 34221	NONE		DONATIONS	25,000.
Bradenton Country Club 4646 9th Avenue West Bradenton, FL 34209	NONE		DONATIONS	750.
Florida School Choice Fund 337 South Plant Avenue Tampa, FL 33606	NONE		DONATIONS	500.
Ashley Clark 628 Sea View Drive Destin, FL 32541	Employee Dependent		SCHOLARSHIP	937.
Ashley Jacobs 1024 Grandeur Street Palm Bay, FL 32909	Employee Dependent		SCHOLARSHIP	1,250.
Corey Daharsh 6482 Harold Avenue Cocoa, FL 32927	Employee Dependent		SCHOLARSHIP	3,750.
Dominique Walker 304 25th Street East Palmetto, FL 34221	Employee Dependent		SCHOLARSHIP	1,250.
Jared Freeman 463 Louis Ed. Court Lakeland, FL 33809	Employee Dependent		SCHOLARSHIP	937.
Nicolas Peters 217 Howey Road Sebring, FL 33872	Employee Dependent		SCHOLARSHIP	2,500.

R.M. BEALL SR. CHARITABLE FOUNDATION

59-2851924

Statement 10 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Randee Pitkin 11057 Valencia Avenue Seminole, FL 33772	Employee Dependent		SCHOLARSHIP	\$ 5,000.
American Red Cross 2905 59th Street West Bradenton, FL 34209	NONE		DONATIONS	73,671.
13th Avenue Community Center 201 13th Avenue W Bradenton, FL 34205	NONE		DONATIONS	250.
Boy Scouts of America 1801 Boy Scout Drive Fort Myers, FL 33907	NONE		DONATIONS	440.
Children's Academy of Southwest FL, Inc. 923 26th Street West Bradenton, FL 34205	NONE		DONATIONS	500.
Alexis Arrazcaeta 3128 Latrobe Street New Port Richey, FL 34655	Employee Dependent		SCHOLARSHIP	1,250.
Ashlie Law 21 Leidel Drive Palm Coast, FL 32137	Employee Dependent		SCHOLARSHIP	7,500.
Benjamin Speakman 3015 SW 23rd Terrace Miami, FL 34984	Employee Dependent		SCHOLARSHIP	2,500.
Cedrick Myrick 1815 3rd Avenue West Palmetto, FL 34221	Employee Dependent		SCHOLARSHIP	2,500.
Christina Miller 23020 SW Marine Boulevard Dunnellon, FL 34431	Employee Dependent		SCHOLARSHIP	2,500.
Emily Beltran 238 Heritage Isles Way Bradenton, FL 34212	Employee Dependent		SCHOLARSHIP	1,250.
Francisco Esparza 1917 Gerber Dairy Road Winter Haven, FL 33880	Employee Dependent		SCHOLARSHIP	1,250.

R.M. BEALL SR. CHARITABLE FOUNDATION

59-2851924

Statement 10 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Jennifer Oakley 2996 Seasons Boulevard Sarasota, FL 34240	Employee Dependent		SCHOLARSHIP	\$ 1,250.
Joaquin Mendoza 4526 Busti Drive Sarasota, FL 34232	Employee Dependent		SCHOLARSHIP	2,500.
Kari Truong 5309 36th Avenue Circle West Bradenton, FL 34209	Employee Dependent		SCHOLARSHIP	625.
Katelyn Gooden 2675 Bantry Bay Drive Tallahassee, FL 32309	Employee Dependent		SCHOLARSHIP	625.
Kyle Hemsley 9820 55th Way Pinellas Park, FL 33782	Employee Dependent		SCHOLARSHIP	2,500.
Leah Stewart 6350 Grand Oak Circle # 101 Bradenton, FL 34203	Employee Dependent		SCHOLARSHIP	5,000.
Melvin Melendez 1055 SW 62nd Boulevard Gainesville, FL 32607	Employee Dependent		SCHOLARSHIP	1,250.
Myrline Joseph 1802 9th Avenue East Bradenton, FL 34208	Employee Dependent		SCHOLARSHIP	937.
Nicole Damico 83 Mayfield Circle Ormond Beach, FL 32174	Employee Dependent		SCHOLARSHIP	1,250.
Nirmankdmar Gadhiya 2320 46th Avenue West Apt. 23 Bradenton, FL 34207	Employee Dependent		SCHOLARSHIP	2,500.
Patrick Bailey 5202 17th Avenue West Bradenton, FL 34209	Employee Dependent		SCHOLARSHIP	2,187.
Sarah Osoria - Ruiz 2807 31st Avenue East Bradenton, FL 34208	Employee Dependent		SCHOLARSHIP	2,500.

R.M. BEALL SR. CHARITABLE FOUNDATION

59-2851924

Statement 10 (continued)
Form 990-PF, Part XV, Line 3a
Recipient Paid During the Year

<u>Name and Address</u>	<u>Donee Relationship</u>	<u>Found- ation Status</u>	<u>Purpose of Grant</u>	<u>Amount</u>
Sophie Pierre 919 38th Terrace East Bradenton, FL 34208	Employee Dependent		SCHOLARSHIP	\$ 1,250.
Zac Thaliath 4465 67th Street East Bradenton, FL 34203	Employee Dependent		SCHOLARSHIP	2,500.
Total				\$ <u>209,401.</u>

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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foundations@beallsinc.com

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
- ♦ Class Registration Schedule
- ♦ Financial Aid Award Letter or Summary
- ♦ 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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foundations@beallinc.com

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

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Have you been convicted of any offense within the last five years? ☐ Yes ☐ 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

BEALL'S FOUNDATIONS

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SCHOLARSHIP APPLICATION - EMPLOYEES

Name: _____ Last First Middle	Local Phone #: _____
Address: _____ Street or Box Number	Social Security #: _____
City State Zip	Email Address: _____
Birth date: _____	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

Have you been convicted of any offense within the last five years _____ yes _____ 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 Beall's, Inc. to conduct an investigation of the contents of this application and will not hold anyone liable who supplies information.

Student's Signature

Parent/Guardian Signature

Date

Return the fully completed application to: R. M. Beall, Sr. Charitable Foundation
P. O. Box 25207
Bradenton, Florida 34206-5207

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foundations@beallsinc.com

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: _____

BEALL'S FOUNDATIONS

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REFERENCE

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:

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Thank you very much.

Sincerely,

Patricia A. Johnson

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

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In what capacity? _____

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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: _____

**Application for Extension of Time To File an
Exempt Organization Return**

OMB No. 1545-1709

Department of the Treasury
Internal Revenue Service► **File a separate application for each return.**

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

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

Electronic filing (e-file). You can electronically file Form 8868 if you need a 3-month automatic extension of time to file (6 months for a corporation required to file Form 990-T), or an additional (not automatic) 3-month extension of time. You can electronically file Form 8868 to request an extension of time to file any of the forms listed in Part I or Part II with the exception of Form 8870, Information Return for Transfers Associated With Certain Personal Benefit Contracts, which must be sent to the IRS in paper format (see instructions). For more details on the electronic filing of this form, visit www.irs.gov/efile and click on *e-file for Charities & Nonprofits*

Part I Automatic 3-Month Extension of Time. Only submit original (no copies needed).A corporation required to file Form 990-T and requesting an automatic 6-month extension – check this box and complete Part I only ☐*All other corporations (including 1120-C filers), partnerships, REMICS, and trusts must use Form 7004 to request an extension of time to file income tax returns*

Type or print File by the due date for filing your return. See instructions.	Name of exempt organization	Employer identification number
	R.M. BEALL SR. CHARITABLE FOUNDATION	59-2851924
	Number, street, and room or suite number. If a P.O. box, see instructions.	
	1806 38TH AVE EAST	
	City, town or post office, state, and ZIP code. For a foreign address, see instructions.	
	BRADENTON, FL 34208	

Enter the Return code for the return that this application is for (file a separate application for each return)

04

Application Is For	Return Code	Application Is For	Return Code
Form 990	01	Form 990-T (corporation)	07
Form 990-BL	02	Form 1041-A	08
Form 990-EZ	03	Form 4720	09
Form 990-PF	04	Form 5227	10
Form 990-T (section 401(a) or 408(a) trust)	05	Form 6069	11
Form 990-T (trust other than above)	06	Form 8870	12

- The books are in the care of ► MICHAEL MADDALONI

Telephone No. ► (941) 747-2355

FAX No. ►

- If the organization does not have an office or place of business in the United States, check this box ☐
- If this is for a Group Return, enter the organization's four digit Group Exemption Number (GEN) _____ If this is for the whole group, check this box ☐. If it is for part of the group, check this box ☐ and attach a list with the names and EINs of all members the extension is for.

- 1 I request an automatic 3-month (6 months for a corporation required to file Form 990-T) extension of time until 8/16, 20 11, to file the exempt organization return for the organization named above. The extension is for the organization's return for

► ☒ calendar year 20 10 or► ☐ tax year beginning _____, 20 _____, and ending _____, 20 _____.

- 2 If the tax year entered in line 1 is for less than 12 months, check reason ☐ Initial return ☐ Final return ☐ Change in accounting period

3a If this application is for Form 990-BL, 990-PF, 990-T, 4720, or 6069, enter the tentative tax, less any nonrefundable credits. See instructions.	3a	\$	6,028.
b If this application is for Form 990-PF, 990-T, 4720, or 6069, enter any refundable credits and estimated tax payments made. Include any prior year overpayment allowed as a credit.	3b	\$	6,028.
c Balance due. Subtract line 3b from line 3a. Include your payment with this form, if required, by using EFTPS (Electronic Federal Tax Payment System). See instructions.	3c	\$	0.

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

BAA For Paperwork Reduction Act Notice, see Instructions.Form **8868** (Rev. 1-2011)