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Return of Private Foundation

OMB No 1545-0052

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

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 OCT 1, 2010, and ending SEP 30, 2011

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

Name of foundation FISHER AND FUEL SOCIETY OF BEVERLY		A Employer identification number 04-6039361
Number and street (or P O box number if mail is not delivered to street address) 150 PINE STREET	Room/suite	B Telephone number (351) 201-9583
City or town, state, and ZIP code DANVERS, MA 01923-2630		C If exemption application is pending, check here <input type="checkbox"/>
H Check type of organization <input checked="" type="checkbox"/> Section 501(c)(3) exempt private foundation <input type="checkbox"/> Section 4947(a)(1) nonexempt charitable trust <input type="checkbox"/> Other taxable private foundation		D 1. Foreign organizations, check here <input type="checkbox"/> 2. Foreign organizations meeting the 85% test, check here and attach computation <input type="checkbox"/>
I Fair market value of all assets at end of year (from Part II, col. (c), line 16) \$ 1,430,491.	J Accounting method <input checked="" type="checkbox"/> Cash <input type="checkbox"/> Accrual <input type="checkbox"/> Other (specify) _____	E If private foundation status was terminated under section 507(b)(1)(A), check here <input type="checkbox"/>
(Part I, column (d) must be on cash basis.)		F If the foundation is in a 60-month termination under section 507(b)(1)(B), check here <input type="checkbox"/>

Part I Analysis of Revenue and Expenses (The total of amounts in columns (b), (c), and (d) may not necessarily equal the amounts in column (a))		(a) Revenue and expenses per books	(b) Net investment income	(c) Adjusted net income	(d) Disbursements for charitable purposes (cash basis only)	
Revenue	1 Contributions, gifts, grants, etc., received	5,000.				
	2 Check <input type="checkbox"/> if the foundation is not required to attach Sch B					
	3 Interest on savings and temporary cash investments	24.	24.	24.	STATEMENT 1	
	4 Dividends and interest from securities	47,750.	47,750.	47,750.	STATEMENT 2	
	5a Gross rents					
	b Net rental income or (loss)					
	6a Net gain or (loss) from sale of assets not on line 10	12,411.				
	b Gross sales price for all assets on line 6a	158,139.				
	7 Capital gain net income (from Part IV, line 2)		12,411.			
	8 Net short-term capital gain			N/A		
	9 Income modifications					
	10a Gross sales less returns and allowances					
b Less Cost of goods sold						
c Gross profit (loss)						
11 Other income						
12 Total. Add lines 1 through 11	65,185.	60,185.	47,774.			
Operating and Administrative Expenses	13 Compensation of officers, directors, trustees, etc	2,000.	1,332.	1,332.	668.	
	14 Other employee salaries and wages					
	15 Pension plans, employee benefits					
	16a Legal fees					
	b Accounting fees	STMT 3	2,600.	1,734.	1,734.	866.
	c Other professional fees	STMT 4	9,262.	2,316.	2,316.	6,946.
	17 Interest					
	18 Taxes	STMT 5	185.	0.	0.	0.
	19 Depreciation and depletion					
	20 Occupancy					
	21 Travel, conferences, and meetings					
	22 Printing and publications					
	23 Other expenses	STMT 6	190.	0.	0.	190.
	24 Total operating and administrative expenses. Add lines 13 through 23		14,237.	5,382.	5,382.	8,670.
	25 Contributions, gifts, grants paid		64,933.			64,933.
26 Total expenses and disbursements. Add lines 24 and 25		79,170.	5,382.	5,382.	73,603.	
27 Subtract line 26 from line 12		<13,985.>				
a Excess of revenue over expenses and disbursements						
b Net investment income (if negative, enter -0-)		54,803.				
c Adjusted net income (if negative, enter -0-)			42,392.			

Part II Balance Sheets

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

		Beginning of year	End of year	
		(a) Book Value	(b) Book Value	(c) Fair Market Value
Assets	1 Cash - non-interest-bearing			
	2 Savings and temporary cash investments	16,881.	18,150.	18,150.
	3 Accounts receivable ▶			
	Less: allowance for doubtful accounts ▶			
	4 Pledges receivable ▶			
	Less: allowance for doubtful accounts ▶			
	5 Grants receivable			
	6 Receivables due from officers, directors, trustees, and other disqualified persons			
	7 Other notes and loans receivable ▶			
	Less: allowance for doubtful accounts ▶			
	8 Inventories for sale or use			
	9 Prepaid expenses and deferred charges			
	10a Investments - U.S. and state government obligations			
	b Investments - corporate stock			
	c Investments - corporate bonds			
11 Investments - land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
12 Investments - mortgage loans				
13 Investments - other STMT 7	1,170,202.	1,154,948.	1,412,341.	
14 Land, buildings, and equipment basis ▶				
Less: accumulated depreciation ▶				
15 Other assets (describe ▶)				
16 Total assets (to be completed by all filers)	1,187,083.	1,173,098.	1,430,491.	
Liabilities	17 Accounts payable and accrued expenses			
	18 Grants payable			
	19 Deferred revenue			
	20 Loans from officers, directors, trustees, and other disqualified persons			
	21 Mortgages and other notes payable			
	22 Other liabilities (describe ▶)			
	23 Total liabilities (add lines 17 through 22)	0.	0.	
Net Assets or Fund Balances	Foundations that follow SFAS 117, check here ▶ <input checked="" type="checkbox"/> X			
	24 Unrestricted	1,187,083.	1,173,098.	
	25 Temporarily restricted			
	26 Permanently restricted			
	Foundations that do not follow SFAS 117, check here ▶ <input type="checkbox"/>			
	27 Capital stock, trust principal, or current funds			
	28 Paid-in or capital surplus, or land, bldg, and equipment fund			
	29 Retained earnings, accumulated income, endowment, or other funds			
	30 Total net assets or fund balances	1,187,083.	1,173,098.	
31 Total liabilities and net assets/fund balances	1,187,083.	1,173,098.		

Part III Analysis of Changes in Net Assets or Fund Balances

1 Total net assets or fund balances at beginning of year - Part II, column (a), line 30 (must agree with end-of-year figure reported on prior year's return)	1	1,187,083.
2 Enter amount from Part I, line 27a	2	<13,985.>
3 Other increases not included in line 2 (itemize) ▶	3	0.
4 Add lines 1, 2, and 3	4	1,173,098.
5 Decreases not included in line 2 (itemize) ▶	5	0.
6 Total net assets or fund balances at end of year (line 4 minus line 5) - Part II, column (b), line 30	6	1,173,098.

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold (e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co.)		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a				
b SEE ATTACHED STATEMENTS				
c				
d				
e				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a			
b			
c			
d			
e 158,139.		145,728.	12,411.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Gains (Col (h) gain minus col (k), but not less than -0-) or Losses (from col (h))
a			
b			
c			
d			
e			12,411.

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter -0- in Part I, line 7 }		2	12,411.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) { If gain, also enter in Part I, line 8, column (c) If (loss), enter -0- in Part I, line 8 }		3	76.

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

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

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

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

☐ Yes ☒ No

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

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

(a) Base period years Calendar year (or tax year beginning in)	(b) Adjusted qualifying distributions	(c) Net value of noncharitable-use assets	(d) Distribution ratio (col (b) divided by col (c))
2009	80,664.	1,454,465.	.055460
2008	84,129.	1,440,587.	.058399
2007	74,970.	1,689,188.	.044382
2006	83,088.	1,767,485.	.047009
2005	74,410.	1,675,367.	.044414

2 Total of line 1, column (d)	2	.249664
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	.049933
4 Enter the net value of noncharitable-use assets for 2010 from Part X, line 5	4	1,435,962.
5 Multiply line 4 by line 3	5	71,702.
6 Enter 1% of net investment income (1% of Part I, line 27b)	6	548.
7 Add lines 5 and 6	7	72,250.
8 Enter qualifying distributions from Part XII, line 4	8	73,603.

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

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

1a Exempt operating foundations described in section 4940(d)(2), check here <input type="checkbox"/> and enter "N/A" on line 1 Date of ruling or determination letter _____ (attach copy of letter if necessary-see instructions)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here <input checked="" type="checkbox"/> and enter 1% of Part I, line 27b		1	548.
c All other domestic foundations enter 2% of line 27b. Exempt foreign organizations enter 4% of Part I, line 12, col (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	548.
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	548.
6 Credits/Payments			
a 2010 estimated tax payments and 2009 overpayment credited to 2010	6a	2,190.	
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	2,190.	
8 Enter any penalty for underpayment of estimated tax. Check here <input type="checkbox"/> 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		
10 Overpayment. If line 7 is more than the total of lines 5 and 8, enter the amount overpaid	10	1,642.	
11 Enter the amount of line 10 to be Credited to 2011 estimated tax <input checked="" type="checkbox"/> 1,642. Refunded <input type="checkbox"/>	11	0.	

Part VII-A Statements Regarding Activities

	Yes	No
1a During the tax year, did the foundation attempt to influence any national, state, or local legislation or did it participate or intervene in any political campaign?		X
1b Did it spend more than \$100 during the year (either directly or indirectly) for political purposes (see instructions for definition)? If the answer is "Yes" to 1a or 1b, attach a detailed description of the activities and copies of any materials published or distributed by the foundation in connection with the activities.		X
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 <input checked="" type="checkbox"/> \$ 0. (2) On foundation managers <input checked="" type="checkbox"/> \$ 0.		
e Enter the reimbursement (if any) paid by the foundation during the year for political expenditure tax imposed on foundation managers <input checked="" type="checkbox"/> \$ 0.		
2 Has the foundation engaged in any activities that have not previously been reported to the IRS? If "Yes," attach a detailed description of the activities.		X
3 Has the foundation made any changes, not previously reported to the IRS, in its governing instrument, articles of incorporation, or bylaws, or other similar instruments? If "Yes," attach a conformed copy of the changes		X
4a Did the foundation have unrelated business gross income of \$1,000 or more during the year?		X
b If "Yes," has it filed a tax return on Form 990-T for this year?		
5 Was there a liquidation, termination, dissolution, or substantial contraction during the year? If "Yes," attach the statement required by General Instruction T.		X
6 Are the requirements of section 508(e) (relating to sections 4941 through 4945) satisfied either: • By language in the governing instrument, or • By state legislation that effectively amends the governing instrument so that no mandatory directions that conflict with the state law remain in the governing instrument?	X	
7 Did the foundation have at least \$5,000 in assets at any time during the year? If "Yes," complete Part II, col (c), and Part XV.	X	
8a Enter the states to which the foundation reports or with which it is registered (see instructions) <input checked="" type="checkbox"/> MA		
b If the answer is "Yes" to line 7, has the foundation furnished a copy of Form 990-PF to the Attorney General (or designate) of each state as required by General Instruction G? If "No," attach explanation	X	
9 Is the foundation claiming status as a private operating foundation within the meaning of section 4942(j)(3) or 4942(j)(5) for calendar year 2010 or the taxable year beginning in 2010 (see instructions for Part XIV)? If "Yes," complete Part XIV		X
10 Did any persons become substantial contributors during the tax year? If "Yes," attach a schedule listing their names and addresses		X

N/A

Part VII-A Statements Regarding Activities (continued)

11	At any time during the year, did the foundation, directly or indirectly, own a controlled entity within the meaning of section 512(b)(13)? If "Yes," attach schedule (see instructions)	11		X
12	Did the foundation acquire a direct or indirect interest in any applicable insurance contract before August 17, 2008?	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application? Website address ► N/A	13	X	
14	The books are in care of ► AVIS BEAULIEU, TREASURER Telephone no ► 351-201-9583 Located at ► 150 PINE STREET, DANVERS, MA ZIP+4 ► 01923			
15	Section 4947(a)(1) nonexempt charitable trusts filing Form 990-PF in lieu of Form 1041 - Check here and enter the amount of tax-exempt interest received or accrued during the year ► 15 N/A			
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 page 20 of the instructions for exceptions and filing requirements for Form TD F 90-22.1 If "Yes," enter the name of the foreign country ►	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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(2)	Borrow money from, lend money to, or otherwise extend credit to (or accept it from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(3)	Furnish goods, services, or facilities to (or accept them from) a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(4)	Pay compensation to, or pay or reimburse the expenses of, a disqualified person? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(5)	Transfer any income or assets to a disqualified person (or make any of either available for the benefit or use of a disqualified person)? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
(6)	Agree to pay money or property to a government official? (Exception. Check "No" if the foundation agreed to make a grant to or to employ the official for a period after termination of government service, if terminating within 90 days) <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If any answer is "Yes" to 1a(1)-(6), did any of the acts fail to qualify under the exceptions described in Regulations section 53.4941(d)-3 or in a current notice regarding disaster assistance (see page 22 of the instructions)? Organizations relying on a current notice regarding disaster assistance check here N/A ► <input type="checkbox"/>	1b	
c	Did the foundation engage in a prior year in any of the acts described in 1a, other than excepted acts, that were not corrected before the first day of the tax year beginning in 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? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If "Yes," list the years ►		
b	Are there any years listed in 2a for which the foundation is not applying the provisions of section 4942(a)(2) (relating to incorrect valuation of assets) to the year's undistributed income? (If applying section 4942(a)(2) to all years listed, answer "No" and attach statement - see instructions.) N/A	2b	
c	If the provisions of section 4942(a)(2) are being applied to any of the years listed in 2a, list the years here. ►		
3a	Did the foundation hold more than a 2% direct or indirect interest in any business enterprise at any time during the year? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No		
b	If "Yes," did it have excess business holdings in 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) N/A	3b	
4a	Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4a	X
b	Did the foundation make any investment in a prior year (but after December 31, 1969) that could jeopardize its charitable purpose that had not been removed from jeopardy before the first day of the tax year beginning in 2010?	4b	X

Form 990-PF (2010)

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

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

☐ Yes ☒ No

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

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

N/A

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?

If "Yes" to 6b, file Form 8870.

6b

X

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

N/A

7b

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

(a) Name and address	(b) Title, and average hours per week devoted to position	(c) Compensation (If not paid, enter -0-)	(d) Contributions to employee benefit plans and deferred compensation	(e) Expense account, other allowances
SEE STATEMENT 8		2,000.	0.	0.

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

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

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

0

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

1	Fair market value of assets not used (or held for use) directly in carrying out charitable, etc., purposes:		
a	Average monthly fair market value of securities	1a	1,440,313.
b	Average of monthly cash balances	1b	17,516.
c	Fair market value of all other assets	1c	
d	Total (add lines 1a, b, and c)	1d	1,457,829.
e	Reduction claimed for blockage or other factors reported on lines 1a and 1c (attach detailed explanation)	1e	0.
2	Acquisition indebtedness applicable to line 1 assets	2	0.
3	Subtract line 2 from line 1d	3	1,457,829.
4	Cash deemed held for charitable activities. Enter 1 1/2% of line 3 (for greater amount, see instructions)	4	21,867.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	1,435,962.
6	Minimum investment return. Enter 5% of line 5	6	71,798.

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	71,798.
2a	Tax on investment income for 2010 from Part VI, line 5	2a	548.
b	Income tax for 2010 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	548.
3	Distributable amount before adjustments. Subtract line 2c from line 1	3	71,250.
4	Recoveries of amounts treated as qualifying distributions	4	0.
5	Add lines 3 and 4	5	71,250.
6	Deduction from distributable amount (see instructions)	6	0.
7	Distributable amount as adjusted. Subtract line 6 from line 5. Enter here and on Part XIII, line 1	7	71,250.

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	73,603.
b	Program-related investments - total from Part IX-B	1b	0.
2	Amounts paid to acquire assets used (or held for use) directly in carrying out charitable, etc., purposes	2	
3	Amounts set aside for specific charitable projects that satisfy the:		
a	Suitability test (prior IRS approval required)	3a	
b	Cash distribution test (attach the required schedule)	3b	
4	Qualifying distributions. Add lines 1a through 3b. Enter here and on Part V, line 8, and Part XIII, line 4	4	73,603.
5	Foundations that qualify under section 4940(e) for the reduced rate of tax on net investment income. Enter 1% of Part I, line 27b	5	548.
6	Adjusted qualifying distributions. Subtract line 5 from line 4	6	73,055.

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 2009	(c) 2009	(d) 2010
1 Distributable amount for 2010 from Part XI, line 7				71,250.
2 Undistributed income, if any, as of the end of 2010				
a Enter amount for 2009 only			57,337.	
b Total for prior years		0.		
3 Excess distributions carryover, if any, to 2010				
a From 2005				
b From 2006				
c From 2007				
d From 2008				
e From 2009				
f Total of lines 3a through e	0.			
4 Qualifying distributions for 2010 from Part XII, line 4 ▶ \$ 73,603.				
a Applied to 2009, but not more than line 2a			57,337.	
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				16,266.
e Remaining amount distributed out of corpus	0.			
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	0.			
b Prior years' undistributed income Subtract line 4b from line 2b		0.		
c Enter the amount of prior years' undistributed income for which a notice of deficiency has been issued, or on which the section 4942(a) tax has been previously assessed		0.		
d Subtract line 6c from line 6b Taxable amount - see instructions		0.		
e Undistributed income for 2009 Subtract line 4a from line 2a Taxable amount - see instr			0.	
f Undistributed income for 2010 Subtract lines 4d and 5 from line 1 This amount must be distributed in 2011				54,984.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3)	0.			
8 Excess distributions carryover from 2005 not applied on line 5 or line 7	0.			
9 Excess distributions carryover to 2011. Subtract lines 7 and 8 from line 6a	0.			
10 Analysis of line 9				
a Excess from 2006				
b Excess from 2007				
c Excess from 2008				
d Excess from 2009				
e Excess from 2010				

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

FISHER AND FUEL SOCIETY OF BEVERLY

Employer identification number

04-6039361

Organization type (check one):

Filers of:

Section:

Form 990 or 990-EZ

☐ 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 foundationCheck if your organization is covered by the **General Rule** or a **Special Rule**.**Note.** Only a section 501(c)(7), (8), or (10) organization can check boxes for both the General Rule and a Special Rule. See instructions.**General Rule**

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

Special Rules

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

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

LHA For 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

Employer identification number

FISHER AND FUEL SOCIETY OF BEVERLY

04-6039361

Part I Contributors (see instructions)

(a) No.	(b) Name, address, and ZIP + 4	(c) Aggregate contributions	(d) Type of contribution
1	BOOTH CHARITABLE LEAD TRUST 8 WASHINGTON STREET BEVERLY, MA 01915	\$ 5,000.	Person <input checked="" type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)
		\$	Person <input type="checkbox"/> Payroll <input type="checkbox"/> Noncash <input type="checkbox"/> (Complete Part II if there is a noncash contribution.)

Name of organization

Employer identification number

FISHER AND FUEL SOCIETY OF BEVERLY

04-6039361

Part II Noncash Property (see instructions)

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

Name of organization

Employer identification number

FISHER AND FUEL SOCIETY OF BEVERLY**04-6039361**

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 columns (a) through (e) and the following line entry. For organizations completing Part III, enter the total of exclusively religious, charitable, etc., contributions of \$1,000 or less for the year. (Enter this information once. See instructions.) ▶ \$

(a) No. from Part I	(b) Purpose of gift	(c) Use of gift	(d) Description of how gift is held
	(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

FISHER AND FUEL SOCIETY OF BEVERLY

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e.g., real estate, 2-story brick warehouse, or common stock, 200 shs MLC Co		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo., day, yr.)	(d) Date sold (mo., day, yr.)
1a	FEDERAL HOME LOAN BANK	P	09/25/07	10/01/10
b	CARDINAL HEALTH LITIGATION PROCEEDS	P	10/24/02	11/26/10
c	ABBOTT LABORATORIES	P	01/23/96	01/03/11
d	AUTOMATIC DATA PROCESSING	P	12/08/05	01/03/11
e	BOEING CO	P	09/18/95	01/03/11
f	HOME DEPOT INC	P	01/23/96	01/03/11
g	HEWLETT PACKARD INC	P	11/01/00	01/03/11
h	IBM	P	05/17/02	01/03/11
i	JOHNSON & JOHNSON	P	06/14/96	01/03/11
j	COCA COLA CORP	P	01/23/96	01/03/11
k	MICROSOFT CORP	P	02/19/03	01/03/11
l	NEXTERA ENERGY INC	P	03/17/05	01/03/11
m	OMNICOM GROUP INC	P	12/10/03	01/03/11
n	ORACLE CORP	P	10/30/07	01/03/11
o	PFIZER INC	P	07/01/99	01/03/11

(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-- 25,000.		25,000.	0.
b 51.			51.
c 5,931.		2,277.	3,654.
d 2,093.		1,913.	180.
e 1,618.		879.	739.
f 4,730.		1,267.	3,463.
g 1,271.		498.	773.
h 2,931.		2,123.	808.
i 4,047.		316.	3,731.
j 3,268.		1,812.	1,456.
k 2,796.		537.	2,259.
l 2,334.		1,048.	1,286.
m 1,848.		1,671.	177.
n 2,039.		1,410.	629.
o 2,191.		992.	1,199.

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

(i) FMV as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			0.
b			51.
c			3,654.
d			180.
e			739.
f			3,463.
g			773.
h			808.
i			3,731.
j			1,456.
k			2,259.
l			1,286.
m			177.
n			629.
o			1,199.

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

FISHER AND FUEL SOCIETY OF BEVERLY

Part IV Capital Gains and Losses for Tax on Investment Income

(a) List and describe the kind(s) of property sold, e g , real estate, 2-story brick warehouse; or common stock, 200 shs MLC Co		(b) How acquired P - Purchase D - Donation	(c) Date acquired (mo , day, yr)	(d) Date sold (mo , day, yr)
1a	PROCTOR & GAMBLE	P	06/14/02	01/03/11
b	SCHLUMBERGER LTD	P	12/31/99	01/03/11
c	SOUTHERN CO	P	10/01/01	01/03/11
d	PRICE T ROWE GROUP INC	P	12/08/05	01/03/11
e	UNITED TECN CORP	P	10/24/02	01/03/11
f	VERIZON COMMUNICATIONS	P	07/09/10	01/03/11
g	WALGREEN CO	P	02/17/99	01/03/11
h	WALMART STORES INC	P	10/01/01	01/03/11
i	EXXON-MOBIL CORP	P	12/03/99	01/03/11
j	BB&T CORP	P	06/30/10	03/15/11
k	BEST BUY INC	P	08/04/05	03/31/11
l	BANK OF AMERICA CORP	P	10/24/02	08/09/11
m	FEDERAL HOME LOAN BANK	P	08/29/08	09/26/11
n				
o				

(e) Gross sales price	(f) Depreciation allowed (or allowable)	(g) Cost or other basis plus expense of sale	(h) Gain or (loss) (e) plus (f) minus (g)
a 5,795.		917.	4,878.
b 4,182.		555.	3,627.
c 2,496.		1,579.	917.
d 3,819.		2,251.	1,568.
e 3,163.		1,277.	1,886.
f 2,492.		2,351.	141.
g 2,551.		179.	2,372.
h 2,706.		2,446.	260.
i 4,779.		1,226.	3,553.
j 3,182.		3,247.	<65.>
k 5,485.		7,112.	<1,627.>
l 5,341.		30,845.	<25,504.>
m 50,000.		50,000.	0.
n			
o			

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

(i) F M V as of 12/31/69	(j) Adjusted basis as of 12/31/69	(k) Excess of col (i) over col (j), if any	(l) Losses (from col (h)) Gains (excess of col (h) gain over col (k), but not less than "-0-")
a			4,878.
b			3,627.
c			917.
d			1,568.
e			1,886.
f			** 141.
g			2,372.
h			260.
i			3,553.
j			** <65.>
k			<1,627.>
l			<25,504.>
m			0.
n			
o			

2 Capital gain net income or (net capital loss) { If gain, also enter in Part I, line 7 If (loss), enter "-0-" in Part I, line 7 }	2	12,411.
3 Net short-term capital gain or (loss) as defined in sections 1222(5) and (6) If gain, also enter in Part I, line 8, column (c) If (loss), enter "-0-" in Part I, line 8 }	3	76.

FORM 990-PF . INTEREST ON SAVINGS AND TEMPORARY CASH INVESTMENTS STATEMENT 1

SOURCE	AMOUNT
DANVERSBANK	24.
TOTAL TO FORM 990-PF, PART I, LINE 3, COLUMN A	24.

FORM 990-PF DIVIDENDS AND INTEREST FROM SECURITIES STATEMENT 2

SOURCE	GROSS AMOUNT	CAPITAL GAINS DIVIDENDS	COLUMN (A) AMOUNT
DANVERSBANK	36,128.	0.	36,128.
PEOPLE'S UNITED BANK	11,622.	0.	11,622.
TOTAL TO FM 990-PF, PART I, LN 4	47,750.	0.	47,750.

FORM 990-PF ACCOUNTING FEES STATEMENT 3

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

FORM 990-PF OTHER PROFESSIONAL FEES STATEMENT 4

DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
INVESTMENT MANAGEMENT FEES	9,262.	2,316.	2,316.	6,946.
TO FORM 990-PF, PG 1, LN 16C	9,262.	2,316.	2,316.	6,946.

FORM 990-PF	TAXES	STATEMENT	5
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
STATE FILING FEE	185.	0.	0.	0.
TO FORM 990-PF, PG 1, LN 18	185.	0.	0.	0.

FORM 990-PF	OTHER EXPENSES	STATEMENT	6
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DESCRIPTION	(A) EXPENSES PER BOOKS	(B) NET INVEST- MENT INCOME	(C) ADJUSTED NET INCOME	(D) CHARITABLE PURPOSES
OFFICE EXPENSES	190.	0.	0.	190.
TO FORM 990-PF, PG 1, LN 23	190.	0.	0.	190.

FORM 990-PF	OTHER INVESTMENTS	STATEMENT	7
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DESCRIPTION	VALUATION METHOD	BOOK VALUE	FAIR MARKET VALUE
PEOPLE'S UNITED BANK PORTFOLIO	COST	1,154,948.	1,412,341.
TOTAL TO FORM 990-PF, PART II, LINE 13		1,154,948.	1,412,341.

FORM 990-PF . PART VIII - LIST OF OFFICERS, DIRECTORS STATEMENT 8
 TRUSTEES AND FOUNDATION MANAGERS

NAME AND ADDRESS	TITLE AND AVRG HRS/WK	COMPEN- SATION	EMPLOYEE BEN PLAN CONTRIB	EXPENSE ACCOUNT
LAWRENCE M. SMITH 85 GROVER STREET BEVERLY, MA 01915	PRESIDENT/TRUSTEE 1.00	0.	0.	0.
AVIS A. BEAULIEU 150 PINE STREET DANVERS, MA 01923	TREASURER/SECRETARY 3.00	2,000.	0.	0.
RICHARD F. MOONEY 95 BAKER AVENUE BEVERLY, MA 01915	TRUSTEE 1.00	0.	0.	0.
PETER A. HERSEE 17 JUNIPER STREET WENHAM, MA 01984	TRUSTEE 1.00	0.	0.	0.
JOHN E. GLOVSKY, ESQUIRE 8 WASHINGTON STREET BEVERLY, MA 01915	TRUSTEE 1.00	0.	0.	0.
WILLIAM HOWARD 254 CABOT STREET BEVERLY, MA 01915	TRUSTEE 1.00	0.	0.	0.
TOTALS INCLUDED ON 990-PF, PAGE 6, PART VIII		2,000.	0.	0.

FORM 990-PF . GRANT APPLICATION SUBMISSION INFORMATION STATEMENT 9
PART XV, LINES 2A THROUGH 2D

NAME AND ADDRESS OF PERSON TO WHOM APPLICATIONS SHOULD BE SUBMITTED

AVIS BEAULIEU
240 CABOT STREET
BEVERLY, MA 01915

TELEPHONE NUMBER

(978)624-3397

FORM AND CONTENT OF APPLICATIONS

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

ANY SUBMISSION DEADLINES

NONE

RESTRICTIONS AND LIMITATIONS ON AWARDS

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

FISHER AND FUEL SOCIETY OF BEVERLY
Breakdown of Disbursements by Category
October 1, 2010 - September 30, 2011

04-6039361

<u>REFERRED BY</u>	<u>ASSISTANCE FOR</u>	<u>BEVERLY ADDRESS</u>	<u>AMOUNT</u>
St. Vincent de Paul	James Corrado	38 Pond Street	\$500.00
St. Vincent de Paul	Carol Brook	98 Corning Street	\$1,500.00
St. Vincent de Paul	Kimberly Parsons	180 Bridge Street	\$1,000.00
St. Vincent de Paul	Tammie Cabral	10 Jasper Street	\$945.58
St. Vincent de Paul	Sondra Noonan	273 Rantoul Street	\$1,200.00
TOTAL NATIONAL GRID			\$5,145.58
Beverly Bootstraps	Dana Tivnan	93 Cabot Street	\$1,270.00
St. Vincent de Paul	Vanessa Bonilla	12 Bennett Street	\$475.00
Beverly Bootstraps	Michelle & Joshua Hairston	24 Simon Street	\$688.00
Beverly Bootstraps	Daliah Campbell		\$1,320.00
Beverly Bootstraps	Debbie Grinkley	641R Hale Street	\$1,400.00
Beverly Bootstraps	Debbie & Mike LaBrie	40 Bartlett Street	\$1,600.00
Beverly Bootstraps	Maria Musetti	22 Home Street	\$1,094.38
St. Vincent de Paul	Tanya Nichols	10 Central Street	\$1,400.00
St. Vincent de Paul	Robert Rust	12 Roundy Street	\$1,250.00
Beverly Bootstraps	Teresa McDonald	23 Odell Avenue	\$1,000.00
St. Vincent de Paul	Kristin Lee Howard	22 Northridge Drive	\$870.00
St. Vincent de Paul	Kristin Lee Howard	22 Northridge Drive	\$705.00
Beverly Bootstraps	Dorothy Sicard	17 Grant Street	\$1,000.00
Beverly Bootstraps	Katie Kilduff	1206 Broughton Drive	\$598.00
Beverly Bootstraps	Katie Kilduff	1206 Broughton Drive	\$598.00
St. Vincent de Paul	Theron Carter	41 Bow Street	\$1,450.00
Beverly Bootstraps	James Morache	138 Dodge Street	\$750.00
Beverly Bootstraps	Rebecca Ruest	Motel 6	\$318.99
Beverly Bootstraps	David Ruiz	Lakeview Motor Lodge	\$635.00
Beverly Bootstraps	Marsha Finkelstein	59 Essex Street	\$500.00
Beverly Bootstraps	Charles Franklin	45 Elliott Street	\$1,600.00
Beverly Bootstraps	Mark Flinn	11 Chestnut Street	\$934.26
St. Vincent de Paul	Chuck & Tina Scott	2206 Broughton Drive	\$890.00
St. Vincent de Paul	Jillian Carroll	475 Cabot Street	\$650.00
Beverly Bootstraps	Megan Daily	6 Beverly Commons Drive	\$1,400.00
Beverly Bootstraps	Martha Piesik	273 Rantoul Street	\$1,000.00
Beverly Bootstraps	Thomas Bruch	93 Cabot Street	\$680.00
Beverly Bootstraps	Delacruz		\$1,495.00
St. Vincent de Paul	Patricia Curran	341 Rantoul Street	\$500.00
St. Vincent de Paul	Robert Daily	28 Bartlett Street	\$550.00
Beverly Bootstraps	Glen Norwood	68 Dane Street	\$1,280.00
St. Vincent de Paul	Chuck & Tina Scott	2206 Broughton Drive	\$845.00
Beverly Bootstraps	Virginia & William Coffin	26 Grant Street	\$1,000.00
St. Vincent de Paul	Cindy Noel	50 Winthrop Street	\$1,200.00
Beverly Bootstraps	Dan Hogan	32 Ellsworth Avenue	\$1,857.35
St. Vincent de Paul	Diane Boudreau	34 Grant Street	\$1,350.00

<u>REFERRED BY</u>	<u>ASSISTANCE FOR</u>	<u>BEVERLY ADDRESS</u>	<u>AMOUNT</u>
Beverly Bootstraps	Lisa McKenna	305 Broughton Drive	\$1,200.00
St. Vincent de Paul	Jessica Valente	19 - 23 Beckford Street	\$1,250.00
Beverly Bootstraps	Deborah Walsh-Ibanez	25 Herrick Street	\$750.00
Beverly Bootstraps	John Swain	60 Rantoul Street	\$1,000.00
St. Vincent de Paul	Krista Jones	707 Broughton Drive	\$800.00
Beverly Bootstraps	Barbara Ostrander	9 Bennett Street	\$1,000.00
Beverly Bootstraps	Evamarie Fatello-Urban	46 Pleasant Street	\$1,500.00
St. Vincent de Paul	Martin Badger	32 Railroad Avenue	\$850.00
St. Vincent de Paul	Valerie Slaven-Pappas	102 Elliott Street	\$1,045.00
St. Vincent de Paul	Katrina & Ron Smith	10 Fossa Terrace	\$600.00
St. Vincent de Paul	Barry & Laurie Fanning	19 Whitney Avenue	\$850.00
		TOTAL HOUSING	\$46,998.98
			\$10,000.00
			\$1,919.00
		TOTAL DIST. TO ORGANIZA	\$11,919.00
Beverly Bootstraps	Irving Egbe		\$870.00
		TOTAL OTHER	\$870.00
		TOTAL DIRECT AID	\$64,933.56