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Form 990-PF

Department of the Treasury
Internal Revenue ServiceReturn of Private Foundation
or Section 4947(a)(1) Trust Treated as Private Foundation

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Information about Form 990-PF and its separate instructions is at www.irs.gov/form990pf.

OMB No 1545-0052

2014

Open to Public Inspection

For calendar year 2014, or tax year beginning , 2014, and ending

R.M. BEALL SR. CHARITABLE FOUNDATION
1806 38TH AVE EAST
BRADENTON, FL 34208A Employer identification number
59-2851924B Telephone number (see instructions)
(941) 747-2355C 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 ☐

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

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)
\$ 5,789,329.

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 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 (attach schedule)

158,684.

2 Check ☒ if the foundation is not required to attach Sch B

3 Interest on savings and temporary cash investments

11.

11.

11.

4 Dividends and interest from securities

120,780.

120,780.

120,780.

5a Gross rents

b Net rental income or (loss)

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

386,496.

b Gross sales price for all assets on line 6a 2,966,028.

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

386,496.

8 Net short-term capital gain

9 Income modifications

10a Gross sales less returns and allowances

b Less Cost of goods sold

c Gross profit or (loss) (attach schedule)

11 Other income (attach schedule)

12 Total. Add lines 1 through 11

665,971.

507,287.

120,791.

13 Compensation of officers, directors, trustees, etc

0.

14 Other employee salaries and wages

15 Pension plans, employee benefits

16a Legal fees (attach schedule) See St 1

1,436.

1,436.

b Accounting fees (attach sch) See St 2

14,000.

14,000.

c Other prof fees (attach sch) See St 3

99,400.

52,208.

47,192.

17 Interest

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

834.

834.

19 Depreciation (attach sch) and depletion

20 Occupancy

21 Travel, conferences, and meetings

22 Printing and publications

23 Other expenses (attach schedule)

See Statement 5

212.

212.

24 Total operating and administrative expenses. Add lines 13 through 23

115,882.

52,208.

63,674.

25 Contributions, gifts, grants paid

Part XV

268,075.

268,075.

26 Total expenses and disbursements. Add lines 24 and 25

383,957.

52,208.

0.

331,749.

27 Subtract line 26 from line 12:

a Excess of revenue over expenses and disbursements

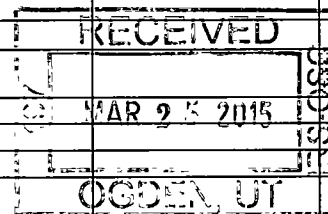
282,014.

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

455,079.

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

120,791.



Part II Balance Sheets		Attached schedules and amounts in the description column should be for end-of-year amounts only (See instructions)		Beginning of year	End of year	
				(a) Book Value	(b) Book Value	(c) Fair Market Value
ASSETS	1	Cash — non-interest-bearing		-65,058.	15,388.	15,388.
	2	Savings and temporary cash investments		361,501.	589,079.	589,079.
	3	Accounts receivable	1,500.			
		Less: allowance for doubtful accounts			1,500.	
	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 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)				
	b	Investments — corporate stock (attach schedule) Statement 6		3,718,420.	3,442,888.	3,706,592.
	c	Investments — corporate bonds (attach schedule) Statement 7		1,256,835.	1,504,857.	1,478,270.
	11	Investments — land, buildings, and equipment basis				
	Less: accumulated depreciation (attach schedule)					
12	Investments — mortgage loans					
13	Investments — other (attach schedule)					
14	Land, buildings, and equipment basis					
	Less: accumulated depreciation (attach schedule)					
15	Other assets (describe)					
16	Total assets (to be completed by all filers — see the instructions. Also, see page 1, item I)		5,271,698.	5,553,712.	5,789,329.	
LIABILITIES	17	Accounts payable and accrued expenses				
	18	Grants payable				
	19	Deferred revenue				
	20	Loans from officers, directors, trustees, & other disqualified persons				
	21	Mortgages and other notes payable (attach schedule)				
	22	Other liabilities (describe)				
	23	Total liabilities (add lines 17 through 22)		0.	0.	
NET ASSETS OR FUND BALANCES	Foundations that follow SFAS 117, check here and complete lines 24 through 26 and lines 30 and 31.					
	24	Unrestricted				
	25	Temporarily restricted				
	26	Permanently restricted				
	Foundations that do not follow SFAS 117, check here and complete lines 27 through 31.			X		
	27	Capital stock, trust principal, or current funds		5,271,698.	5,553,712.	
	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 (see instructions)		5,271,698.	5,553,712.	
	31	Total liabilities and net assets/fund balances (see instructions)		5,271,698.	5,553,712.	

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	5,271,698.
2	Enter amount from Part I, line 27a	2	282,014.
3	Other increases not included in line 2 (itemize)	3	
4	Add lines 1, 2, and 3	4	5,553,712.
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	5,553,712.

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)
1 a 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			(i) 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		2 386,496.
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 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))
2013	290,853.	4,495,156.	0.064704
2012	198,554.	3,802,257.	0.052220
2011	241,459.	3,918,034.	0.061628
2010	219,831.	3,859,288.	0.056962
2009	163,815.	2,953,720.	0.055461
2 Total of line 1, column (d)			2 0.290975
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 0.058195
4 Enter the net value of noncharitable-use assets for 2014 from Part X, line 5			4 5,758,880.
5 Multiply line 4 by line 3			5 335,138.
6 Enter 1% of net investment income (1% of Part I, line 27b)			6 4,551.
7 Add lines 5 and 6			7 339,689.
8 Enter qualifying distributions from Part XII, line 4			8 331,749.

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)

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 instrs)			
b Domestic foundations that meet the section 4940(e) requirements in Part V, check here ☐ and enter 1% of Part I, line 27b		1	9,102.
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	9,102.
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	9,102.
6 Credits/Payments			
a 2014 estimated tax pmts and 2013 overpayment credited to 2014	6 a		
b Exempt foreign organizations – tax withheld at source	6 b		
c Tax paid with application for extension of time to file (Form 8868)	6 c		
d Backup withholding erroneously withheld	6 d		
7 Total credits and payments. Add lines 6a through 6d	7		0.
8 Enter any penalty for underpayment of estimated tax. Check here ☐ if Form 2220 is attached	8		
9 Tax due. If the total of lines 5 and 8 is more than line 7, enter amount owed	9		9,102.
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 2015 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 Instructions for the 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 XV</i>	X	
8 a Enter the states to which the foundation reports or with which it is registered (see 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 <i>General Instruction G</i> ? <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 2014 or the taxable year beginning in 2014 (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 make a distribution to a donor advised fund over which the foundation or a disqualified person had advisory privileges? If 'Yes', attach statement (see instructions)	12		X
13	Did the foundation comply with the public inspection requirements for its annual returns and exemption application?	13	X	
Website address <u>N/A</u>				
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 2014, 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?	16		X
See the instructions for exceptions and filing requirements for FinCEN Form 114, (formerly TD F 90-22 1) If 'Yes,' enter the name of the foreign country <u></u>				

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 instructions)? Organizations relying on a current notice regarding disaster assistance check here <u></u>	1 b	N/A
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 2014?	1 c	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 2014, did the foundation have any undistributed income (lines 6d and 6e, Part XIII) for tax year(s) beginning before 2014? 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 instructions.)	2 b	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 2014 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 2014.)	3 b	N/A
4a Did the foundation invest during the year any amount in a manner that would jeopardize its charitable purposes?	4 a	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 2014?	4 b	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 4945(d)(4)(A)? (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)?Organizations relying on a current notice regarding disaster assistance check here ☐**5 b** N/A**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? ☐ Yes ☐ No

N/A

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? ☐ Yes ☒ No

If 'Yes' to 6b, file Form 8870

6 b 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? ☐ Yes ☒ No

N/A

7 b**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 12.00	0.	0.	0.
BETTY B. SZYMANSKI 1806 38TH AVE. E. BRADENTON, FL 34208	Board 2.00	0.	0.	0.
CLIFFORD L. WALTERS 1806 38TH AVE. E. BRADENTON, FL 34208	Board 2.00	0.	0.	0.

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

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

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

0

Part VIII Information About Officers, Directors, Trustees, Foundation Managers, Highly Paid Employees, and Contractors (continued)**3** Five highest-paid independent contractors for professional services (see instructions). If none, enter 'NONE.'

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

Part IX-A Summary of Direct Charitable Activities

List the foundation's four largest direct charitable activities during the tax year. Include relevant statistical information such as the number of organizations and other beneficiaries served, conferences convened, research papers produced, etc.

	Expenses
1 SCHOLARSHIPS	
	256,125.
2 DONATIONS	
	11,950.
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	5,798,427.
b	Average of monthly cash balances	1b	48,152.
c	Fair market value of all other assets (see instructions)	1c	
d	Total (add lines 1a, b, and c)	1d	5,846,579.
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	5,846,579.
4	Cash deemed held for charitable activities Enter 1-1/2% of line 3 (for greater amount, see instructions)	4	87,699.
5	Net value of noncharitable-use assets. Subtract line 4 from line 3. Enter here and on Part V, line 4	5	5,758,880.
6	Minimum investment return. Enter 5% of line 5	6	287,944.

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	287,944.
2a	Tax on investment income for 2014 from Part VI, line 5	2a	9,102.
b	Income tax for 2014 (This does not include the tax from Part VI)	2b	
c	Add lines 2a and 2b	2c	9,102.
3	Distributable amount before adjustments Subtract line 2c from line 1	3	278,842.
4	Recoveries of amounts treated as qualifying distributions	4	
5	Add lines 3 and 4	5	278,842.
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	278,842.

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	331,749.
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	331,749.
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	Adjusted qualifying distributions. Subtract line 5 from line 4	6	331,749.

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 2013	(c) 2013	(d) 2014
1 Distributable amount for 2014 from Part XI, line 7				278,842.
2 Undistributed income, if any, as of the end of 2014				
a Enter amount for 2013 only			0.	
b Total for prior years: 20__, 20__, 20__		0.		
3 Excess distributions carryover, if any, to 2014				
a From 2009	16,731.			
b From 2010	38,923.			
c From 2011	46,659.			
d From 2012	9,255.			
e From 2013	66,965.			
f Total of lines 3a through e	178,533.			
4 Qualifying distributions for 2014 from Part XII, line 4: ► \$ 331,749.				
a Applied to 2013, 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 2014 distributable amount				278,842.
e Remaining amount distributed out of corpus	52,907.			
5 Excess distributions carryover applied to 2014 (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	231,440.			
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 2013. Subtract line 4a from line 2a. Taxable amount – see instructions			0.	
f Undistributed income for 2014. Subtract lines 4d and 5 from line 1 This amount must be distributed in 2015				0.
7 Amounts treated as distributions out of corpus to satisfy requirements imposed by section 170(b)(1)(F) or 4942(g)(3) (Election may be required – see instructions)	0.			
8 Excess distributions carryover from 2009 not applied on line 5 or line 7 (see instructions)	16,731.			
9 Excess distributions carryover to 2015. Subtract lines 7 and 8 from line 6a	214,709.			
10 Analysis of line 9				
a Excess from 2010	38,923.			
b Excess from 2011	46,659.			
c Excess from 2012	9,255.			
d Excess from 2013	66,965.			
e Excess from 2014	52,907.			

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

N/A

- | | | | | |
|--|--|--|--|-------------------------------------|
| 1 a If the foundation has received a ruling or determination letter that it is a private operating foundation, and the ruling is effective for 2014, 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) |

2 a Enter the lesser of the adjusted net income from Part I or the minimum investment return from Part X for each year listed	Tax year	Prior 3 years			(e) Total
	(a) 2014	(b) 2013	(c) 2012	(d) 2011	
b 85% of line 2a					
c Qualifying distributions from Part XII, line 4 for each year listed					
d Amounts included in line 2c not used directly for active conduct of exempt activities					
e Qualifying distributions made directly for active conduct of exempt activities. Subtract line 2d from line 2c					

3 Complete 3a, b, or c for the alternative test relied upon				
a 'Assets' alternative test – enter				
(1) Value of all assets				
(2) Value of assets qualifying under section 4942(j)(3)(B)(i)				
b 'Endowment' alternative test – enter 2/3 of minimum investment return shown in Part X, line 6 for each year listed				
c 'Support' alternative test – enter:				
(1) Total support other than gross investment income (interest, dividends, rents, payments on securities loans (section 512(a)(5)), or royalties)				
(2) Support from general public and 5 or more exempt organizations as provided in section 4942(j)(3)(B)(iii)				
(3) Largest amount of support from an exempt organization				
(4) Gross investment income				

Part XV **Supplementary Information (Complete this part only if the foundation 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 or e-mail address 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 Paid during the year See Statement 10				
Total			▶ 3a	268,075.
b Approved for future payment				
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 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	11.	
4	Dividends and interest from securities			14	120,780.	
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					386,496.
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)				120,791.	386,496.
13	Total. Add line 12, columns (b), (d), and (e)				13	507,287.

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

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

[illegible]

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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	\$ 76.			\$ 76.
Legal Fees	1,360.			1,360.
Total	<u>\$ 1,436.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 1,436.</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
ADMINISTRATIVE EXPENSE	\$ 47,192.			\$ 47,192.
INVESTMENT FEES	52,208.	\$ 52,208.		
Total	<u>\$ 99,400.</u>	<u>\$ 52,208.</u>	<u>\$ 0.</u>	<u>\$ 47,192.</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 - RMB	\$ 435.			\$ 435.
TAXES - RMBO	399.			399.
Total	<u>\$ 834.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 834.</u>

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Statement 5
Form 990-PF, Part I, Line 23
Other Expenses

	(a) Expenses per Books	(b) Net Investment Income	(c) Adjusted Net Income	(d) Charitable Purposes
BOARD MEMBER EXPENSE	\$ 87.			\$ 87.
REGISTRATION FEE	125.			125.
Total	<u>\$ 212.</u>	<u>\$ 0.</u>	<u>\$ 0.</u>	<u>\$ 212.</u>

Statement 6
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
ARTISAN INTERNATIONAL VALUE FUND	Cost	\$ 564,541.	\$ 689,841.
ASTON FDS ASTON/RIVER RD	Cost	0.	0.
DFA US CORE EQUITY 2 PORTFOLIO FUND	Cost	123,307.	200,214.
FPA CRESCENT FUND	Cost	289,829.	332,003.
IVA WORLD FUND	Cost	326,788.	330,056.
SCHWAB CAP TR HEDGED EQUITY FD	Cost	0.	0.
SPDR GOLD TRUST	Cost	84,523.	56,790.
NEUBERGER BERMAN REAL ESTATE FUND	Cost	84,856.	93,055.
ISHARES GOLD TRUST	Cost	35,085.	34,320.
ASTON/CORNERSTONE LARGE CAP VALUE FUND	Cost	0.	0.
DELAWARE POOLED TRUST	Cost	297,633.	274,187.
DFA INTL REAL ESTATE SEC PORTFOLIO	Cost	0.	0.
MAINSTAY MARKETFIELD FUND	Cost	0.	0.
WISDOMTREE JAPAN HEDGED EQUITY FUND	Cost	125,140.	130,263.
CHEVRON CORPORATION	Cost	23,712.	21,314.
ENSCO PLC CL A	Cost	18,257.	10,483.
ROYAL DUTCH SHELL SPONSORED AMERICAN	Cost	14,960.	13,055.
BOEING CO	Cost	12,308.	12,348.
CH ROBINSON WORLDWIDE INC	Cost	12,689.	16,101.
CUMMINS INC	Cost	23,587.	22,635.
EMERSON ELEC CO	Cost	26,699.	24,692.
EXPEDITORS INTL WASH INC	Cost	7,671.	7,807.
GRAINGER W W INC	Cost	16,810.	17,078.
NORFOLK SOUTHERN CORP	Cost	15,891.	18,634.
PARKER HANNIFIN CORP	Cost	25,400.	26,435.
UNITED TECHNOLOGIES CORP	Cost	15,436.	14,950.
3M CO	Cost	10,493.	12,324.
BED BATH & BEYOND INC	Cost	19,048.	23,613.
GAP INC	Cost	19,676.	21,266.
MATTEL INC	Cost	24,691.	19,341.
MCDONALDS CORP	Cost	15,439.	14,055.
OMNICOM GROUP	Cost	7,884.	8,909.
TRW AUTOMOTIVE HOLDINGS CORP	Cost	9,781.	11,828.
PEPSICO INC	Cost	7,824.	8,510.
PROCTER & GAMBLE CO	Cost	15,134.	16,852.
SYSCO CORP	Cost	7,547.	8,136.
WAL MART STORES INC	Cost	35,602.	38,646.
BAXTER INTL INC	Cost	28,434.	27,850.
BECTON DICKINSON	Cost	15,347.	18,091.
JOHNSON & JOHNSON	Cost	19,849.	20,914.
MEDTRONIC INC	Cost	15,273.	18,050.

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Statement 6 (continued)
Form 990-PF, Part II, Line 10b
Investments - Corporate Stocks

Corporate Stocks	Valuation Method	Book Value	Fair Market Value
STRYKER CORPORATION	Cost	\$ 7,429.	\$ 8,490.
VARIAN MEDICAL SYSTEMS INC	Cost	15,401.	16,004.
ACE LIMITED	Cost	20,889.	23,550.
BERKSHIRE HATHAWAY INC-CL B	Cost	7,628.	9,009.
CAPITAL ONE FINANCIAL CORP	Cost	20,858.	22,701.
CITIGROUP INC	Cost	18,313.	20,832.
JP MORGAN CHASE & CO	Cost	21,428.	24,093.
UNUM GROUP	Cost	20,388.	21,137.
ACCENTURE PLC CL A	Cost	15,456.	17,415.
APPLE INC	Cost	20,756.	26,160.
CISCO SYSTEMS INC	Cost	33,382.	39,636.
COGNIZANT TECHNOLOGY SOLUTIONS CORP	Cost	7,838.	8,426.
EMC CORP MASS	Cost	19,556.	22,602.
INTEL CORP	Cost	15,324.	21,048.
INTL. BUSINESS MACHINES CORP	Cost	15,425.	12,835.
MICROSOFT CORP	Cost	36,461.	42,502.
ORACLE CORPORATION	Cost	45,192.	49,017.
QUALCOMM INC	Cost	25,209.	23,786.
WESTERN DIGITAL CORP	Cost	17,979.	23,801.
CREDIT SUISSE MLP EQUAL WEIGHT INDEX ETN	Cost	145,688.	132,254.
ISHARES RUSSELL 2000 ETF	Cost	399,459.	412,211.
BLACKSTONE ALTERNATIVE MULTI-STRATEGY	Cost	115,685.	114,437.
	Total	\$ 3,442,888.	\$ 3,706,592.

Statement 7
Form 990-PF, Part II, Line 10c
Investments - Corporate Bonds

Corporate Bonds	Valuation Method	Book Value	Fair Market Value
TEMPLETON GLOBAL BOND FUND	Cost	\$ 443,514.	\$ 410,161.
VANGUARD TOTAL BOND MARKET INDEX FUND	Cost	606,946.	622,581.
TCW FDS INC EMERGING MKTS INCOME	Cost	0.	0.
NEUBERGER BERMAN HIGH INCOME BOND FUND	Cost	118,782.	113,407.
ANGEL OAK MULTI-STRATEGY INCOME FUND	Cost	117,647.	115,852.
VANGUARD SHORT-TERM INVESTMENT GRADE FUN	Cost	217,968.	216,269.
	Total	\$ 1,504,857.	\$ 1,478,270.

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	4239.683 SCHWAB HEDGED EQUITY-SL	Purchased	Various	1/07/2014
2	16127.043 TCW EMERG MKTS INCOME-I	Purchased	Various	1/28/2014
3	11499.289 SCHWAB HEDGED EQUITY FUND SL	Purchased	Various	2/14/2014
4	41660.138 ASTON/CORNERSTONE L/C VALUE	Purchased	Various	5/02/2014
5	3 HASBRO INC	Purchased	Various	5/06/2014

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Statement 8 (continued)
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
6	30321.407 DFA US CORE EQUITY 2 PORT	Purchased	Various	5/09/2014
7	24 GOOGLE INC CL A	Purchased	Various	5/07/2014
8	2 HASBRO INC	Purchased	Various	5/07/2014
9	2 HASBRO INC	Purchased	Various	5/07/2014
10	9 HASBRO INC	Purchased	Various	5/07/2014
11	15 HASBRO INC	Purchased	Various	5/08/2014
12	7 HASBRO INC	Purchased	Various	5/09/2014
13	4 HASBRO INC	Purchased	Various	5/09/2014
14	7 HASBRO INC	Purchased	Various	5/12/2014
15	4 HASBRO INC	Purchased	Various	5/12/2014
16	6 HASBRO INC	Purchased	Various	5/13/2014
17	4 HASBRO INC	Purchased	Various	5/13/2014
18	6 HASBRO INC	Purchased	Various	5/14/2014
19	6 HASBRO INC	Purchased	Various	5/15/2014
20	12 HASBRO INC	Purchased	Various	5/16/2014
21	12 HASBRO INC	Purchased	Various	5/19/2014
22	6 HASBRO INC	Purchased	Various	5/20/2014
23	9 HASBRO INC	Purchased	Various	5/22/2014
24	4 HASBRO INC	Purchased	Various	5/22/2014
25	8 HASBRO INC	Purchased	Various	5/22/2014
26	6 INTL. BUSINESS MACHINES CORP	Purchased	Various	5/22/2014
27	10 HASBRO INC	Purchased	Various	5/23/2014
28	14 HASBRO INC	Purchased	Various	5/23/2014
29	9 INTL. BUSINESS MACHINES CORP	Purchased	Various	5/23/2014
30	8 INTL. BUSINESS MACHINES CORP	Purchased	Various	5/23/2014
31	12 HASBRO INC	Purchased	Various	5/27/2014
32	10 INTL. BUSINESS MACHINES CORP	Purchased	Various	5/27/2014
33	13 HASBRO INC	Purchased	Various	5/28/2014
34	7 HASBRO INC	Purchased	Various	5/28/2014
35	15 INTL. BUSINESS MACHINES CORP	Purchased	Various	5/28/2014
36	9 HASBRO INC	Purchased	Various	5/29/2014
37	17 INTL. BUSINESS MACHINES CORP	Purchased	Various	5/29/2014
38	7 HASBRO INC	Purchased	Various	5/30/2014
39	3 HASBRO INC	Purchased	Various	5/30/2014
40	1 HASBRO INC	Purchased	Various	6/02/2014
41	8 HASBRO INC	Purchased	Various	6/04/2014
42	2337.814 DFA US CORE EQUITY 2 PORT	Purchased	Various	6/11/2014
43	2505.01 DELAWARE POOLED TR EMERG MKT	Purchased	Various	6/11/2014
44	2901.915 FPA CRESCENT FUND-I	Purchased	Various	6/11/2014
45	15 ACE LIMITED	Purchased	Various	6/11/2014
46	9 APPLE INC	Purchased	Various	6/11/2014
47	20 BAXTER INTL INC	Purchased	Various	6/11/2014
48	20 BED BATH & BEYOND INC	Purchased	Various	6/11/2014
49	20 CAPITAL ONE FINANCIAL CORP	Purchased	Various	6/11/2014
50	15 CHEVRON CORPORATION	Purchased	Various	6/11/2014
51	45 CISCO SYSTEMS INC	Purchased	Various	6/11/2014
52	25 CITIGROUP INC	Purchased	Various	6/11/2014
53	8 CUMMINS INC	Purchased	Various	6/11/2014
54	55 EMC CORP MASS	Purchased	Various	6/11/2014
55	25 EMERSON ELEC CO	Purchased	Various	6/11/2014
56	15 EXXONMOBIL CORP	Purchased	Various	6/11/2014
57	25 GAP INC	Purchased	Various	6/11/2014
58	2 GRAINGER W W INC	Purchased	Various	6/11/2014
59	5 HASBRO INC	Purchased	Various	6/11/2014
60	45 INTEL CORP	Purchased	Various	6/11/2014
61	30 JP MORGAN CHASE & CO	Purchased	Various	6/11/2014

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Statement 8 (continued)
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
62	10 JOHNSON & JOHNSON	Purchased	Various	6/11/2014
63	40 MATTEL INC	Purchased	Various	6/11/2014
64	35 MICROSOFT CORP	Purchased	Various	6/11/2014
65	10 NORFOLK SOUTHERN CORP	Purchased	Various	6/11/2014
66	40 ORACLE CORPORATION	Purchased	Various	6/11/2014
67	15 PARKER HANNIFIN CORP	Purchased	Various	6/11/2014
68	20 QUALCOMM INC	Purchased	Various	6/11/2014
69	20 ROYAL DUTCH SHELL SPONS ADR	Purchased	Various	6/11/2014
70	10 TRW AUTOMOTIVE HOLDINGS CORP	Purchased	Various	6/11/2014
71	10 3M CO	Purchased	Various	6/11/2014
72	40 UNUM GROUP	Purchased	Various	6/11/2014
73	20 WAL MART STORES INC	Purchased	Various	6/11/2014
74	15 WESTERN DIGITAL CORP	Purchased	Various	6/11/2014
75	11 HASBRO INC	Purchased	Various	6/16/2014
76	9 HASBRO INC	Purchased	Various	6/17/2014
77	10 HASBRO INC	Purchased	Various	6/17/2014
78	16 HASBRO INC	Purchased	Various	6/18/2014
79	10 HASBRO INC	Purchased	Various	6/18/2014
80	45 EXXONMOBIL CORP	Purchased	Various	6/19/2014
81	12 HASBRO INC	Purchased	Various	6/19/2014
82	13 ROYAL DUTCH SHELL SPONS ADR	Purchased	Various	6/19/2014
83	6 HASBRO INC	Purchased	Various	6/20/2014
84	14 HASBRO INC	Purchased	Various	6/20/2014
85	13 HASBRO INC	Purchased	Various	6/20/2014
86	55 ROYAL DUTCH SHELL SPONS ADR	Purchased	Various	6/20/2014
87	9 HASBRO INC	Purchased	Various	6/23/2014
88	2 ROYAL DUTCH SHELL SPONS ADR	Purchased	Various	6/23/2014
89	16641.185 DFA INTL REAL ESTATE SEC PORTFOLIO	Purchased	Various	8/04/2014
90	17 ROYAL DUTCH SHELL SPONS ADR	Purchased	Various	7/31/2014
91	2942.908 FPA CRESCENT FUND-I	Purchased	Various	8/05/2014
92	8029.979 NEUBERGER BERMAN HI IN B-INS	Purchased	Various	8/05/2014
93	23 ROYAL DUTCH SHELL SPONS ADR	Purchased	Various	8/01/2014
94	75 INTEL CORP	Purchased	Various	8/15/2014
95	30 APPLE INC	Purchased	Various	9/11/2014
96	3 NORFOLK SOUTHERN CORP	Purchased	Various	9/12/2014
97	5 NORFOLK SOUTHERN CORP	Purchased	Various	9/15/2014
98	11 NORFOLK SOUTHERN CORP	Purchased	Various	9/16/2014
99	2 NORFOLK SOUTHERN CORP	Purchased	Various	9/16/2014
100	9 NORFOLK SOUTHERN CORP	Purchased	Various	9/16/2014
101	15 3M CO	Purchased	Various	9/16/2014
102	1172.444 FPA CRESCENT FUND-I	Purchased	Various	9/22/2014
103	1817.21 IVA WORLD FUND-I	Purchased	Various	9/22/2014
104	1676.385 MAINSTAY MARKETFIELD FUND-I	Purchased	Various	9/22/2014
105	45 CH ROBINSON WORLDWIDE INC	Purchased	Various	10/03/2014
106	85 CISCO SYSTEMS INC	Purchased	Various	10/03/2014
107	90 MICROSOFT CORP	Purchased	Various	10/03/2014
108	35 APPLE INC	Purchased	Various	10/21/2014
109	25 TRW AUTOMOTIVE HOLDINGS CORP	Purchased	Various	10/30/2014
110	26 EXXONMOBIL CORP	Purchased	Various	11/13/2014
111	83 EXXONMOBIL CORP	Purchased	Various	11/14/2014
112	21 EXXONMOBIL CORP	Purchased	Various	11/17/2014
113	8 3M CO	Purchased	Various	11/24/2014
114	10 3M CO	Purchased	Various	11/25/2014
115	12 3M CO	Purchased	Various	11/26/2014
116	44220.775 ASTON RIVER RD SELECT VAL-I	Purchased	Various	12/02/2014

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Statement 8 (continued)
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
117	13277.394 MAINSTAY MARKETFIELD FUND-I	Purchased	Various	12/02/2014
118	2842.524 DFA US CORE EQUITY 2 PORT	Purchased	Various	12/09/2014
119	200 SPDR GOLD TRUST	Purchased	Various	12/09/2014
120	12 BED BATH & BEYOND INC	Purchased	Various	12/15/2014
121	14 BED BATH & BEYOND INC	Purchased	Various	12/15/2014
122	14 BED BATH & BEYOND INC	Purchased	Various	12/16/2014
123	Capital Gain Dividends			

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	75,000.		64,146.	10,854.				\$ 10,854.
2	133,616.		140,881.	-7,265.				-7,265.
3	202,273.		173,984.	28,289.				28,289.
4	618,236.		548,916.	69,320.				69,320.
5	167.		167.	0.				0.
6	500,000.		334,085.	165,915.				165,915.
7	12,347.		12,831.	-484.				-484.
8	111.		111.	0.				0.
9	111.		111.	0.				0.
10	498.		498.	0.				0.
11	831.		831.	0.				0.
12	388.		388.	0.				0.
13	222.		222.	0.				0.
14	389.		389.	0.				0.
15	223.		223.	0.				0.
16	333.		333.	0.				0.
17	222.		222.	0.				0.
18	332.		332.	0.				0.
19	323.		323.	0.				0.
20	649.		649.	0.				0.
21	647.		651.	-4.				-4.
22	320.		320.	0.				0.
23	484.		544.	-60.				-60.
24	215.		215.	0.				0.
25	430.		430.	0.				0.
26	1,116.		1,116.	0.				0.
27	538.		596.	-58.				-58.
28	753.		774.	-21.				-21.
29	1,672.		1,672.	0.				0.
30	1,486.		1,498.	-12.				-12.
31	642.		682.	-40.				-40.
32	1,848.		1,950.	-102.				-102.
33	694.		721.	-27.				-27.
34	374.		391.	-17.				-17.
35	2,754.		2,878.	-124.				-124.
36	479.		515.	-36.				-36.
37	3,109.		3,319.	-210.				-210.
38	375.		391.	-16.				-16.
39	161.		168.	-7.				-7.
40	52.		56.	-4.				-4.
41	412.		447.	-35.				-35.
42	40,000.		25,450.	14,550.				14,550.
43	24,862.		23,123.	1,739.				1,739.
44	100,000.		84,156.	15,844.				15,844.

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)
45	1,562.		1,529.	33.			\$	33.
46	848.		766.	82.				82.
47	1,467.		1,496.	-29.				-29.
48	1,216.		1,216.	0.				0.
49	1,616.		1,513.	103.				103.
50	1,876.		1,873.	3.				3.
51	1,125.		1,105.	20.				20.
52	1,219.		1,194.	25.				25.
53	1,270.		1,215.	55.				55.
54	1,470.		1,419.	51.				51.
55	1,686.		1,699.	-13.				-13.
56	1,528.		1,535.	-7.				-7.
57	1,025.		989.	36.				36.
58	538.		507.	31.				31.
59	265.		279.	-14.				-14.
60	1,258.		1,193.	65.				65.
61	1,717.		1,718.	-1.				-1.
62	1,033.		994.	39.				39.
63	1,557.		1,583.	-26.				-26.
64	1,432.		1,394.	38.				38.
65	1,020.		936.	84.				84.
66	1,701.		1,639.	62.				62.
67	1,926.		1,882.	44.				44.
68	1,588.		1,581.	7.				7.
69	1,579.		1,592.	-13.				-13.
70	855.		855.	0.				0.
71	1,445.		1,404.	41.				41.
72	1,410.		1,350.	60.				60.
73	1,522.		1,585.	-63.				-63.
74	1,361.		1,255.	106.				106.
75	575.		614.	-39.				-39.
76	470.		503.	-33.				-33.
77	522.		558.	-36.				-36.
78	837.		893.	-56.				-56.
79	523.		558.	-35.				-35.
80	4,594.		4,603.	-9.				-9.
81	628.		670.	-42.				-42.
82	1,067.		1,035.	32.				32.
83	316.		335.	-19.				-19.
84	737.		782.	-45.				-45.
85	684.		724.	-40.				-40.
86	4,534.		4,379.	155.				155.
87	475.		500.	-25.				-25.
88	166.		159.	7.				7.
89	94,522.		86,124.	8,398.				8,398.
90	1,395.		1,354.	41.				41.
91	100,000.		79,841.	20,159.				20,159.
92	75,000.		75,382.	-382.				-382.
93	1,868.		1,831.	37.				37.
94	2,556.		1,989.	567.				567.
95	2,999.		2,550.	449.				449.
96	324.		281.	43.				43.
97	540.		468.	72.				72.

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)
98	1,190.		1,030.	160.			\$	160.
99	216.		187.	29.				29.
100	974.		843.	131.				131.
101	2,172.		2,106.	66.				66.
102	40,250.		31,539.	8,711.				8,711.
103	34,000.		31,193.	2,807.				2,807.
104	28,750.		30,829.	-2,079.				-2,079.
105	3,015.		2,656.	359.				359.
106	2,140.		1,973.	167.				167.
107	4,129.		3,598.	531.				531.
108	3,572.		2,960.	612.				612.
109	2,530.		2,138.	392.				392.
110	2,461.		2,659.	-198.				-198.
111	7,871.		8,487.	-616.				-616.
112	1,984.		2,147.	-163.				-163.
113	1,278.		1,123.	155.				155.
114	1,585.		1,404.	181.				181.
115	1,896.		1,685.	211.				211.
116	386,490.		402,559.	-16,069.				-16,069.
117	217,218.		244,171.	-26,953.				-26,953.
118	50,000.		30,814.	19,186.				19,186.
119	23,638.		33,809.	-10,171.				-10,171.
120	875.		746.	129.				129.
121	1,013.		871.	142.				142.
122	1,026.		871.	155.				155.
123								80,614.
Total								\$ 386,496.

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:
E-Mail Address:
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>
Just for Girls 936 14th St.W. Bradenton, FL 34205	NONE		DONATIONS	\$ 1,000.
Bradenton Country Club 4646 9th Avenue West Bradenton, FL 34209	NONE		DONATIONS	750.
Zeta Phi Beta Sorority, Inc. PO Box 1255 Palmetto, FL 34220	NONE		DONATIONS	500.
Cedrick Myrick 1815 3rd Avenue West Palmetto, FL 34221	Employee Dependent		SCHOLARSHIP	3,000.
Emily Beltran 238 Heritage Isles Way Bradenton, FL 34212	Employee Dependent		SCHOLARSHIP	1,500.
Jennifer Oakley 2996 Seasons Boulevard Sarasota, FL 34240	Employee Dependent		SCHOLARSHIP	1,500.
Katelyn Gooden 2675 Bantry Bay Drive Tallahassee, FL 32309	Employee Dependent		SCHOLARSHIP	1,500.
Kyle Hemsley 9820 55th Way Pinellas Park, FL 33782	Employee Dependent		SCHOLARSHIP	4,000.
Christopher Berg 420 Lake Ned Rd Winter Haven, FL 33884	Employee Dependent		SCHOLARSHIP	5,125.
Jade Bento 1130 Juniper Hammock Ct. Winter Garden, FL 34787	Employee Dependent		SCHOLARSHIP	3,000.
Jimmy Leon 5001 23rd St. W., #B Bradenton, FL 34207	Employee Dependent		SCHOLARSHIP	3,750.
Jose Berlioz 4240 Day Bridge Place Ellenton, FL 34222	Employee Dependent		SCHOLARSHIP	4,500.
Jose Capula 2309 6th Ave Dr. E Bradenton, FL 34208	Employee Dependent		SCHOLARSHIP	6,000.

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>
Kaitlyn Jacobs 1024 Grandeur St. SE Palm Bay, FL 32909	Employee Dependent		SCHOLARSHIP	\$ 6,000.
Marlene Mendoza 233 Parkland Ave Sarasota, FL 34232	Employee Dependent		SCHOLARSHIP	9,000.
Nicholas Dine 823 Jacaranda Drive Oldsmar, FL 34677	Employee Dependent		SCHOLARSHIP	4,500.
Sarah Wyrzkowski 135 Seagrape Dr., #204 Jupiter, FL 33458	Employee Dependent		SCHOLARSHIP	3,500.
Police Athletic League (Manatee) 202 13th Ave E Bradenton, FL 34208	NONE		DONATIONS	1,000.
Stetson University 421 North Woodland Blvd, Unit 8286 Deland, FL 32723	NONE		DONATIONS	5,000.
Benjamin Auyang 212 Margarette Dr Avon Park, FL 33825	Employee Dependent		SCHOLARSHIP	3,000.
Dequan Harris 5643 18th Way S. Apt B St. Petersburg, FL 33712	Employee Dependent		SCHOLARSHIP	5,500.
Devin Defond 2613 S San Mateo Drive North Port, FL 34288	Employee Dependent		SCHOLARSHIP	3,000.
Gabrielle Arrazcaeta 3128 Latrobe St New Port Richey, FL 34655	Employee Dependent		SCHOLARSHIP	6,000.
Gavrav Thakkar 4216 34th St. E Bradenton, FL 34208	Employee Dependent		SCHOLARSHIP	3,000.
Jennifer Limas 709 11th St. W, Apt A Palmetto, FL 34221	Employee Dependent		SCHOLARSHIP	4,500.

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>
Jonathan Liggieri 13915 Newport Shores Dr. Hudson, FL 34669	Employee Dependent		SCHOLARSHIP	\$ 5,250.
Joshua Ferrari 895 Watt Cir Deltona, FL 32738	Employee Dependent		SCHOLARSHIP	4,500.
Kayla Westpheling 230 Dartmouth Rd St. Augustine, FL 32086	Employee Dependent		SCHOLARSHIP	6,000.
Marissa Freeman 225 E Edgewood Dr, Apt 128 Lakeland, FL 33803	Employee Dependent		SCHOLARSHIP	6,000.
Narah Pena 6916 Hale Ave Tampa, FL 33614	Employee Dependent		SCHOLARSHIP	7,500.
Rachelle Taylor 8425 43rd Ave West Bradenton, FL 34209	Employee Dependent		SCHOLARSHIP	1,500.
Sara Adams 228 Eastlake Club Dr Oldsmar, FL 34677	Employee Dependent		SCHOLARSHIP	7,000.
Tianna Harvey 5116 Rock Dove Loop Lakeland, FL 33810	Employee Dependent		SCHOLARSHIP	7,500.
Ballard Elementary School 912 18th Street West Bradenton, FL 34205	NONE		DONATIONS	1,700.
Aubrianna Hall 258 Adelaide St. Debary, FL 32713	Employee Dependent		SCHOLARSHIP	4,500.
Ayla Mowry 1253 E Saunders Rd Dothan, AL 36301	Employee Dependent		SCHOLARSHIP	6,000.
Baylee Dumouchel 387 Deep Draw Rd Crossville, TN 38555	Employee Dependent		SCHOLARSHIP	4,500.
Bervelie Mitil 1728 32nd Ave E Bradenton, FL 34208	Employee Dependent		SCHOLARSHIP	1,500.

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>
Candice Davis 304 Chickasaw Rd Enterprise, AL 36330	Employee Dependent		SCHOLARSHIP	\$ 3,000.
Carlos Toribio 2614 West Tennessee St., Apt # 9104 Tallahassee, FL 32304	Employee Dependent		SCHOLARSHIP	4,500.
Celeste Eschevarria 3124 Azalea Blossom Dr. Plant City, FL 33567	Employee Dependent		SCHOLARSHIP	2,250.
Charles Bates 920 Lawson Gap Road Boaz, AL 35956	Employee Dependent		SCHOLARSHIP	2,750.
Freddy De La Torre 4213 37th St. Court West Bradenton, FL 34205	Employee Dependent		SCHOLARSHIP	3,000.
Jennifer Colman 8521 30th Street East Parrish, FL 34219	Employee Dependent		SCHOLARSHIP	6,000.
Kristen Truong 5309 36th Ave Cir W Bradenton, FL 34209	Employee Dependent		SCHOLARSHIP	1,500.
Quentin Peterson 1817 2nd Ave E Palmetto, FL 34221	Employee Dependent		SCHOLARSHIP	6,000.
Shakel Albritton 4842 Bookelia Circle Bradenton, FL 34203	Employee Dependent		SCHOLARSHIP	6,000.
Titus Berry 2042 Highpoint Ln Sevierville, TN 37876	Employee Dependent		SCHOLARSHIP	3,000.
Tyler Jacobs 1024 Grandeur St. Palm Bay, FL 32909	Employee Dependent		SCHOLARSHIP	3,000.
Zachary Hardy 1315 North Height Magnolia, AR 71753	Employee Dependent		SCHOLARSHIP	6,000.
Zachary Westpheling 230 Dartmouth Rd St. Augustine, FL 32086	Employee Dependent		SCHOLARSHIP	2,250.

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>
Realize Bradenton P.O. Box 9114 Bradenton, FL 34206	NONE		DONATIONS	\$ 2,000.
Alexis Coulter 7723 9th Ave Dr. NW Bradenton, FL 34209	Employee Dependent		SCHOLARSHIP	6,000.
Amber Marie Dawdy 3012 Mango Tree Drive Edgewater, FL 32141	Employee Dependent		SCHOLARSHIP	4,500.
Ankit Kothari 24917 Laurel Ridge Dr Lutz, FL 33559	Employee Dependent		SCHOLARSHIP	3,000.
Ashleigh Elkins 3321 Wildwood Trail Tallahassee, FL 32312	Employee Dependent		SCHOLARSHIP	3,000.
Ashley Hubbard 8365 Miramar Way Lakewood Ranch, FL 34202	Employee Dependent		SCHOLARSHIP	2,250.
Brooke Kull 1309 64th St W Bradenton, FL 34209	Employee Dependent		SCHOLARSHIP	3,000.
Cassidy Westpheling 230 Dartmouth Rd St. Augustine, FL 32086	Employee Dependent		SCHOLARSHIP	1,500.
Emma Profit 299 Old Oak Circle Palm Harbor, FL 34683	Employee Dependent		SCHOLARSHIP	750.
John Ashman 13424 Purple Finch Cir Lakewood Ranch, FL 34202	Employee Dependent		SCHOLARSHIP	3,000.
Justo Martinez 17604 White Fox Drive Parrish, FL 34219	Employee Dependent		SCHOLARSHIP	4,500.
Louis Vazquez 1419 7th Avenue East Palmetto, FL 34221	Employee Dependent		SCHOLARSHIP	9,000.
Matthew Dunn 313 Shady Lane Port St. Lucie, FL 34952	Employee Dependent		SCHOLARSHIP	7,500.

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>
Megan Whiteside 2921 NE 13th St Gainesville, FL 32609	Employee Dependent		SCHOLARSHIP	\$ 1,750.
Novalene Burke 2124 Grovecrest Loop Lakeland, FL 33813	Employee Dependent		SCHOLARSHIP	3,000.
Rebecca Rodriguez 21 Treetop Circle Ormond Beach, FL 32174	Employee Dependent		SCHOLARSHIP	4,500.
Shanathan Martin 1632 24th St East Palmetto, FL 34221	Employee Dependent		SCHOLARSHIP	3,000.
Sterline Joseph 1818 9th Ave E, Apt 3H Bradenton, FL 34208	Employee Dependent		SCHOLARSHIP	3,000.
Total				\$ <u>268,075.</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

BEALL'S FOUNDATIONS

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P.O. Box 25207
Bradenton, FL 34206-5207
941 744-4455 (Phone)
941 747-0857 (Fax)
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.

BEALL'S FOUNDATIONS

*R M Beall, Sr. Charitable Foundation
R M Beall, Sr. Charitable Operating Foundation
Robert and Aida Beall Family Foundation*

P.O. Box 25207
Bradenton, FL 34205 5207
941.744.4455 (Phone)
941.747.0857 (Fax)
foundations@beallsinc.com

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.

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 34208-5207
941.744.4455 (Phone)
941.747.0857 (Fax)
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: _____

BEALL'S FOUNDATIONS

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941 744-4455 (Phone)
941 747 0857 (Fax)
foundations@beallsinc.com

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: _____

BEALL'S FOUNDATIONS

P.M. Beall, Sr. Charitable Foundation
P.M. Beall, Sr. Charitable Operating Foundation
Robert and A dona Beall Family Foundation

P.O. Box 25207
Bradenton, FL 34206-5207
941.741.4455 (Phone)
941.747.0857 (Fax)
foundations@beallsinc.com

Work History

1. Current Job: Average Hours Worked: _____
Company Name: _____ Address: _____
Phone Number: _____ Supervisor: _____

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

Brief description of duties _____

2. Previous job: Average Hours Worked: _____
Company Name: _____ Address: _____
Phone Number: _____ Supervisor: _____

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

Brief description of duties _____

References

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

a. _____
Name: _____ Relationship: _____
Street or Box Number: _____
City, State, Zip Code: _____

b. _____
Name: _____ Relationship: _____
Street or Box Number: _____
City, State, Zip Code: _____

BEALL'S FOUNDATIONS

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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

R.M. Beall, Sr. Charitable Foundation
S.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

SCHOLARSHIP APPLICATION - EMPLOYEES

Name _____ Last First Middle	Local Phone # _____
Address _____ Street or P.O. 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 _____ State Number of Dependents _____
- 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 _____

b. Name _____ Relationship _____

Street or Box Number _____

Street or Box Number _____

City _____ State _____ Zip _____

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 or 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

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 25297
Bradenton, FL 34206-5297
341.744.4455 (Phone)
341.747.0857 (Fax)
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 34205

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 _____

BEALL'S FOUNDATIONS

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R.M. Beall, Sr. Charitable Operating Foundation
Robert and Aldona Beall Family Foundation

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Bradenton, FL 34206-5207
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941.747.0857 (Fax)
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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 _____

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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? _____

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