

Theory Wellness, Inc.
MRN284150

APPLICATION OF INTENT REVIEW

1. Name and address of the proposed Marijuana Establishment:

Theory Wellness, Inc.
162 Mystic Avenue, Medford, MA 02155

2. Type of license sought and information regarding the application submission:

Retail

The application was reopened four (4) times for additional information.

3. The applicant is a licensee or applicant for other Marijuana Establishment and/or Medical Marijuana Treatment Center license(s):

Type	Status	Location
Retail	Commence Operations	Chicopee
Cultivation, Tier 10/Outdoor (80,000 – 90,000 sq. ft.)	Commence Operations	Sheffield
Cultivation, Tier 2/Indoor (5,001 – 10,000 sq. ft.)	Commence Operations	Bridgewater
Product Manufacturing	Commence Operations	Bridgewater
Retail	Commence Operations	Great Barrington
MTC	Commence Operations	Bridgewater-Bridgewater
MTC	Commence Operations	Bridgewater-Great Barrington
MTC	Commence Operations	Bridgewater-Chicopee

4. List of all required individuals and their roles in the Marijuana Establishment:

Individual	Role
Nicholas Friedman	Person Having Direct/Indirect Control
Brandon Pollock	Person Having Direct/Indirect Control
Andrew Linegar	Person Having Direct/Indirect Control



Steven Derrey	Person Having Direct/Indirect Control
Asher Woodworth	Person Having Direct/Indirect Control
Hunter Pollock	Person Having Direct/Indirect Control
Benjamin Friedman	Person Having Direct/Indirect Control
Jon Shore	Person Having Direct/Indirect Control
Scot Lee	Person Having Direct/Indirect Control

5. List of all required entities and their roles in the Marijuana Establishment:

No other entity appears to have ownership or control over this proposed Marijuana Establishment.

6. Applicant's priority status:

General Review

7. The applicant and municipality executed a Host Community Agreement on March 1, 2022.
8. The applicant conducted a community outreach meeting on October 3, 2022 and provided documentation demonstrating compliance with Commission regulations.
9. The Commission received a municipal response from the City of Medford on April 15, 2023, stating the applicant was in compliance with all local ordinances or bylaws.
10. The applicant proposed the following goals for its Plan to Positively Impact Disproportionately Harmed People:

#	Goal
1	Provide at least \$100,000 in capital to a Social Equity or Economic Empowerment Applicant.
2	Recruit at least 40% of its employees that are (1) Past or present residents of the geographic "areas of disproportionate impact," which have been defined by the Commission, including those in close geographic proximity to Medford such as Boston, Chelsea and Lynn; (2) Commission-designated Certified Economic Empowerment Priority recipients; (3) Commission-designated Social Equity Program participants; (4) Massachusetts residents who have past drug convictions; and (5) Massachusetts residents with parents or spouses who have drug convictions.

BACKGROUND CHECK REVIEW

11. There were disclosures of any past civil or criminal actions, occupational license issues, or marijuana-related business interests in other jurisdictions. None of the disclosures raised suitability issues.



12. There were no concerns arising from background checks on the individuals or entities associated with the application.

MANAGEMENT AND OPERATIONS PROFILE REVIEW

13. The applicant states that it can be operational within six (6) months of receiving the provisional license(s).
14. The applicant's proposed hours of operation are the following:

Day(s)	Hours of Operation
Monday-Sunday	8:00 a.m. to 10:00 p.m.

15. The applicant submitted all required summaries of plans, policies, and procedures for the operation of the proposed establishment. The summaries were determined to be substantially compliant with the Commission's regulations.
16. The applicant proposed the following goals for its Diversity Plan:

#	Goal
1	Recruit 5% women, 25% minorities, 5% veterans, 5% LGBTQ+, and 5% persons with disabilities (5%) for its hiring initiatives.
2	Provide annual diversity and inclusion training with a goal of having at least 85% participation in this training.

17. Plan for obtaining marijuana or marijuana products:

The applicant plans to obtain marijuana from its affiliated licenses. If the need arises, the applicant will obtain marijuana or marijuana products by contracting with other licensed establishments.

RECOMMENDATION

Commission staff recommend provisional licensure with the following conditions:

1. Final license is subject to inspection to ascertain compliance with Commission regulations.
2. Final license is subject to inspection to ascertain compliance with applicable state laws, local codes, ordinances or bylaws, and local licensing requirements.
3. Final licensure is subject to the applicant ensuring that all remaining required individuals be fingerprinted pursuant to previous Commission notifications.
4. The applicant shall cooperate with and provide information to Commission staff.
5. Provisional licensure is subject to the payment of the appropriate license fee.



6. Prior to final licensure, in accordance with 935 CMR 500.140 (6)(g) please include information for substance use disorder treatment programs and the phone number for the Massachusetts Substance Use Helpline on your consumer education.

The applicant has demonstrated compliance with the laws and regulations of the Commonwealth and suitability for licensure. Therefore, the applicant is recommended for provisional licensure.

