



# Massachusetts Cannabis Control Commission

## Marijuana Retailer

### General Information:

License Number: MR285057  
Original Issued Date: 10/02/2024  
Issued Date: 10/02/2024  
Expiration Date: 10/02/2025

## ABOUT THE MARIJUANA ESTABLISHMENT

Business Legal Name: Surf's Up Cannabis Ventures LLC

Phone Number: 617-721-8231 Email Address: ayah@bulfinchstrategies.com

Business Address 1: 770 Gallivan Boulevard

Business Address 2:

Business City: Dorchester

Business State: MA

Business Zip Code: 02122

Mailing Address 1: 47 Ralph Talbot St

Mailing Address 2:

Mailing City: South Weymouth

Mailing State: MA

Mailing Zip Code: 02190

## CERTIFIED DISADVANTAGED BUSINESS ENTERPRISES (DBES)

Certified Disadvantaged Business Enterprises (DBEs): Not a DBE

## PRIORITY APPLICANT

Priority Applicant: no

Priority Applicant Type: Not a Priority Applicant

Economic Empowerment Applicant Certification Number:

RMD Priority Certification Number:

## RMD INFORMATION

Name of RMD:

Department of Public Health RMD Registration Number:

Operational and Registration Status:

To your knowledge, is the existing RMD certificate of registration in good standing?:

If no, describe the circumstances below:

## PERSONS WITH DIRECT OR INDIRECT AUTHORITY

Person with Direct or Indirect Authority 1

Percentage Of Ownership: 82 Percentage Of Control: 33

Role: Manager

Other Role: LLC Manager Member

First Name: Christine

Last Name: Argiros

Suffix:

Gender: Female User Defined Gender:

What is this person's race or ethnicity?: Decline to Answer

Specify Race or Ethnicity:

Person with Direct or Indirect Authority 2

Percentage Of Ownership: 12 Percentage Of Control: 33

Role: Manager Other Role: LLC Manager Member

First Name: Michelle Last Name: Foley Suffix:

Gender: Female User Defined Gender:

What is this person's race or ethnicity?: White (German, Irish, English, Italian, Polish, French)

Specify Race or Ethnicity:

Person with Direct or Indirect Authority 3

Percentage Of Ownership: 6 Percentage Of Control: 33

Role: Manager Other Role: LLC Manager Member, Store Manager

First Name: Richard Last Name: Parsons Suffix:

Gender: Male User Defined Gender:

What is this person's race or ethnicity?: White (German, Irish, English, Italian, Polish, French)

Specify Race or Ethnicity:

ENTITIES WITH DIRECT OR INDIRECT AUTHORITY

Entity with Direct or Indirect Authority 1

Percentage of Control: 33 Percentage of Ownership: 82

Entity Legal Name: GreenTech 770 Ventures LLC Entity DBA: DBA City:

Entity Description: TO ACQUIRE, MANAGE, LEASE, DEVELOP, OWN, OPERATE AND SELL REAL PROPERTY; AND TO ENGAGE IN ANY OTHER LAWFUL BUSINESS OR ACTIVITY PERMITTED BY THE MASSACHUSETTS LIMITED LIABILITY COMPANY ACT.

Foreign Subsidiary Narrative:

Entity Phone: 617-327-8100 Entity Email: cargiros@aol.com Entity Website:
Entity Address 1: 700 Providence Highway Entity Address 2:
Entity City: Norwood Entity State: MA Entity Zip Code: 02062
Entity Mailing Address 1: 700 Providence Highway Entity Mailing Address 2:
Entity Mailing City: Norwood Entity Mailing State: MA Entity Mailing Zip Code: 02062

Relationship Description: GreenTech 770 Ventures LLC is the legal entity holding Christine Argiros' indirect control/ ownership and financial interest in Surf's Up Cannabis Ventures LLC. Christine Argiros is the sole manager/member of GreenTech 770 Ventures LLC.

Entity with Direct or Indirect Authority 2

Percentage of Control: 66 Percentage of Ownership: 18

Entity Legal Name: Surf's Up Cannabis Operations LLC Entity DBA: DBA City:

Entity Description: TO MANAGE CANNABIS RETAIL OPERATIONS AND TO ENGAGE IN ANY OTHER LAWFUL BUSINESS OR ACTIVITY PERMITTED BY THE MASSACHUSETTS LIMITED LIABILITY COMPANY ACT.

Foreign Subsidiary Narrative:

Entity Phone: 617-818-4022 Entity Email: michelle.alvarnas@gmail.com Entity Website:

Entity Address 1: 47 Ralph Talbot St

Entity Address 2:

Entity City: South Weymouth

Entity State: MA

Entity Zip Code: 02190

Entity Mailing Address 1: 47 Ralph Talbot St

Entity Mailing Address 2:

Entity Mailing City: South Weymouth

Entity Mailing State: MA

Entity Mailing Zip Code:

02190

**Relationship Description:** Surf's Up Cannabis Operations LLC is the cannabis retail management company and legal entity holding both Michelle Foley and Richard Parsons' indirect control/ownership and financial interest in Surf's Up Cannabis Ventures LLC. Michelle Foley and Richard Parsons are the sole managers/members of Surf's Cannabis Operations LLC.

**CLOSE ASSOCIATES AND MEMBERS**

No records found

**CAPITAL RESOURCES - INDIVIDUALS**

Individual Contributing Capital 1

First Name: Christine

Last Name: Argiros

Suffix:

Types of Capital: Monetary/Equity

Other Type of Capital:

Total Value of the Capital Provided: \$600000

Percentage of Initial Capital: 100

Capital Attestation: Yes

**CAPITAL RESOURCES - ENTITIES**

No records found

**BUSINESS INTERESTS IN OTHER STATES OR COUNTRIES**

No records found

**DISCLOSURE OF INDIVIDUAL INTERESTS**

Individual 1

First Name: Michelle

Last Name: Foley

Suffix:

Marijuana Establishment Name: CastleLeaf LLC

Business Type: Marijuana Retailer

Marijuana Establishment City: Brighton

Marijuana Establishment State: MA

Individual 2

First Name: Richard

Last Name: Parsons

Suffix:

Marijuana Establishment Name: SIRA Naturals

Business Type: Marijuana Retailer

Marijuana Establishment City: Needham

Marijuana Establishment State: MA

**MARIJUANA ESTABLISHMENT PROPERTY DETAILS**

Establishment Address 1: 770 Gallivan Boulevard

Establishment Address 2:

Establishment City: Boston

Establishment Zip Code: 02122

Approximate square footage of the establishment: 4576

How many abutters does this property have?: 38

Have all property abutters been notified of the intent to open a Marijuana Establishment at this address?: Yes

**HOST COMMUNITY INFORMATION**

Host Community Documentation:

Document Category	Document Name	Type	ID	Upload Date
Plan to Remain Compliant with Local Zoning	Plan to Remain Compliant with Local Zoning.pdf	pdf	6536abf856bf530007d2ba3a	10/23/2023

Community Outreach Meeting Documentation	Surf's Up Cannabis Ventures LLC -- Cedar Grove Civic Association LoS 10-26-2022.pdf	pdf	6537dac0d70a980008eacb91	10/24/2023
Community Outreach Meeting Documentation	Surf's Up Cannabis Ventures LLC -- Councilor Baker LoS 2-8-2023.pdf	pdf	6537e71256bf530007d3ff8b	10/24/2023
Certification of Host Community Agreement	Surf's Up Cananbis Executed HCA.pdf	pdf	65847af90f1a2500089ddf38	12/21/2023
Community Outreach Meeting Documentation	BH Dec 4.pdf	pdf	65847b5efa86d00008bfaf24	12/21/2023
Certification of Host Community Agreement	04.09.20_Form_COM_Attestation.pdf	pdf	65847b620f1a2500089ddf9	12/21/2023
Community Outreach Meeting Documentation	ATTACHMENT B 770 Gallivan Boulevard Public Notice.pdf	pdf	65847b74fa86d00008bfafd3	12/21/2023
Community Outreach Meeting Documentation	ATTACHMENT C 770 Gallivan Boulevard Cannabis Flyer Updated.pdf	pdf	65847b7efa86d00008bfaff7	12/21/2023
Community Outreach Meeting Documentation	RFI Abutters Parcels 2023-3 2.pdf	pdf	65847bb10f1a2500089de0e5	12/21/2023
Community Outreach Meeting Documentation	Page 1.pdf	pdf	65847c42fa86d00008bfb1e3	12/21/2023
Community Outreach Meeting Documentation	Page 2.pdf	pdf	65847c78fa86d00008bfb21a	12/21/2023
Community Outreach Meeting Documentation	Pages%203-7-compressed.pdf	pdf	65847d0a0f1a2500089de372	12/21/2023
Community Outreach Meeting Documentation	Surf's Up Community Meeting Script.pdf	pdf	65847e03fa86d00008bfb50b	12/21/2023
Community Outreach Meeting Documentation	Surf's Up Cannabis Ventures LLC -- Presentation FINAL-compressed.pdf	pdf	65847e2ffa86d00008bfb522	12/21/2023

Total amount of financial benefits accruing to the municipality as a result of the host community agreement. If the total amount is zero, please enter zero and provide documentation explaining this number.: \$

#### POSITIVE IMPACT PLAN

Positive Impact Plan:

Document Category	Document Name	Type	ID	Upload Date
Plan for Positive Impact	Plan for Positive Impact -2.pdf	pdf	65849837fa86d00008bfed40	12/21/2023
Other	Positive Impact Plan RFI Findings.pdf	pdf	6584983f0f1a2500089e1e40	12/21/2023
Other	Mass CultivatED 2024 Cohort Engagement Letter_Surf's Up.docx.pdf	pdf	65a0258d0f1a250008aebfa3	01/11/2024

#### ADDITIONAL INFORMATION NOTIFICATION

Notification:

#### INDIVIDUAL BACKGROUND INFORMATION

Individual Background Information 1



**Role:** Manager **Other Role:**  
**First Name:** Richard **Last Name:** Parsons **Suffix:**  
**RMD Association:** Not associated with an RMD  
**Background Question:** no

**Individual Background Information 2**

**Role:** Manager **Other Role:**  
**First Name:** Christine **Last Name:** Argiros **Suffix:**  
**RMD Association:** Not associated with an RMD  
**Background Question:** no

**Individual Background Information 3**

**Role:** Manager **Other Role:**  
**First Name:** Michelle **Last Name:** Foley **Suffix:**  
**RMD Association:** Not associated with an RMD  
**Background Question:** no

**ENTITY BACKGROUND CHECK INFORMATION**

**Entity Background Check Information 1**

**Role:** Investor/Contributor **Other Role:**  
**Entity Legal Name:** GreenTech 770 Ventures LLC **Entity DBA:**  
**Entity Description:** TO ACQUIRE, MANAGE, LEASE, DEVELOP, OWN, OPERATE AND SELL REAL PROPERTY; AND TO ENGAGE IN ANY OTHER LAWFUL BUSINESS OR ACTIVITY PERMITTED BY THE MASSAC HUSETTS LIMITED LIABILITY COMPANY ACT.  
**Phone:** 617-974-1070 **Email:** cargiros@aol.com  
**Primary Business Address 1:** 700 Providence Highway **Primary Business Address 2:**  
**Primary Business City:** Norwood **Primary Business State:** MA **Principal Business Zip Code:** 02062  
**Additional Information:**

**MASSACHUSETTS BUSINESS REGISTRATION**

**Required Business Documentation:**

Document Category	Document Name	Type	ID	Upload Date
Articles of Organization	Certificate of Organization Surfs up.aspx.pdf	pdf	6536c14c56bf530007d2f9bf	10/23/2023
Articles of Organization	Certificate of Amendment.aspx.pdf	pdf	6536c40056bf530007d2fc03	10/23/2023
Department of Revenue - Certificate of Good standing	SURF'S UP CANNABIS VENTURES LLC.pdf	pdf	65380c7156bf530007d46dda	10/24/2023
DUA attestation if no employees	DUA.pdf	pdf	65380c88d70a980008eb70fc	10/24/2023
Secretary of Commonwealth - Certificate of Good Standing	Surf's Up Certificate of Good Standing.pdf	pdf	653fda4fd70a980008f0d9ed	10/30/2023
Bylaws	Operating_Agreement_-_Surfs_Up_Cannabis.docx.pdf	pdf	654a6a0056bf530007e14f69	11/07/2023
Department of Revenue - Certificate of Good standing	BRN3C2AF4CA81EE_0000024592.pdf	pdf	65847f6c0f1a2500089de83d	12/21/2023

No documents uploaded

Massachusetts Business Identification Number: 001616768

Doing-Business-As Name:

DBA Registration City:

### BUSINESS PLAN

Business Plan Documentation:

Document Category	Document Name	Type	ID	Upload Date
Plan for Liability Insurance	Liability Insurance.pdf	pdf	6536c47156bf530007d2fd22	10/23/2023
Proposed Timeline	Proposed Timeline.docx.pdf	pdf	6536c49ed70a980008e9f973	10/23/2023
Business Plan	Surf's Up Business Plan 10-30-23 AR.pdf	pdf	654a6aa956bf530007e151cc	11/07/2023

### OPERATING POLICIES AND PROCEDURES

Policies and Procedures Documentation:

Document Category	Document Name	Type	ID	Upload Date
Plan for obtaining marijuana or marijuana products	Plan for Obtaining Marijuana.pdf	pdf	65370178d70a980008ea4eb7	10/23/2023
Storage of marijuana	Marijuana Storage.pdf	pdf	653702abd70a980008ea4f31	10/23/2023
Quality control and testing	Procedures for Quality Control and Testing.pdf	pdf	65370410d70a980008ea4f69	10/23/2023
Dispensing procedures	Retail Dispensing Procedures.pdf	pdf	6537042ed70a980008ea4f7d	10/23/2023
Personnel policies including background checks	Personnel Policies Summary.pdf	pdf	6537044dd70a980008ea4f97	10/23/2023
Maintaining of financial records	Maintaining Financial Records.pdf	pdf	6537046c56bf530007d351d9	10/23/2023
Record Keeping procedures	Record Keeping Procedure.pdf	pdf	65370483d70a980008ea4fb1	10/23/2023
Qualifications and training	Qualifications and Training.pdf	pdf	6537051556bf530007d35202	10/23/2023
Energy Compliance Plan	Energy Compliance Plan.pdf	pdf	6537052556bf530007d35216	10/23/2023
Restricting Access to age 21 and older	Restricting Access to Age 21 and Older.pdf	pdf	6537de02d70a980008eae018	10/24/2023
Qualifications and training	Surfs Up.pdf	pdf	658482bd0f1a2500089defbf	12/21/2023
Security plan	Security-3.pdf	pdf	65848f77fa86d00008bfe011	12/21/2023
Security plan	Security Plan RFI Findings.pdf	pdf	65848f7e0f1a2500089e11e3	12/21/2023
Transportation of marijuana	Transportation and Onsite Deliveries both to and from the Marijuana Establishment-3.pdf	pdf	658492b0fa86d00008bfe6ed	12/21/2023
Transportation of marijuana	Transportation Plan RFI Findings.pdf	pdf	658492b8fa86d00008bfe719	12/21/2023
Inventory procedures	Inventory Plan RFI Findings.pdf	pdf	6584939cfa86d00008bfe841	12/21/2023
Inventory procedures	Inventory Policies and Procedures-3.pdf	pdf	658493a40f1a2500089e19e1	12/21/2023
Prevention of diversion	Prevention of Diversion of Marijuana to Minors or the Illicit Market-3.pdf	pdf	65849437fa86d00008bfe8e1	12/21/2023
Prevention of diversion	Prevention of Diversion Plan RFI Findings.pdf	pdf	6584943dfa86d00008bfe8f8	12/21/2023
Diversity plan	Diversity Plan-3.pdf	pdf	658495670f1a2500089e1b63	12/21/2023

Diversity plan	Diversity Plan RFI Findings.pdf	pdf	6584956ffa86d00008bfea61	12/21/2023
Qualifications and training	Surfs Up.pdf	pdf	65a02637fa86d00008d0942b	01/11/2024

### MARIJUANA RETAILER SPECIFIC REQUIREMENTS

No documents uploaded

No documents uploaded

### ATTESTATIONS

I certify that no additional entities or individuals meeting the requirement set forth in 935 CMR 500.101(1)(b)(1) or 935 CMR 500.101(2)(c)(1) have been omitted by the applicant from any marijuana establishment application(s) for licensure submitted to the Cannabis Control Commission.: I Agree

I understand that the regulations stated above require an applicant for licensure to list all executives, managers, persons or entities having direct or indirect authority over the management, policies, security operations or cultivation operations of the Marijuana Establishment; close associates and members of the applicant, if any; and a list of all persons or entities contributing 10% or more of the initial capital to operate the Marijuana Establishment including capital that is in the form of land or buildings.: I Agree

I certify that any entities who are required to be listed by the regulations above do not include any omitted individuals, who by themselves, would be required to be listed individually in any marijuana establishment application(s) for licensure submitted to the Cannabis Control Commission.: I Agree

#### Notification:

I certify that any changes in ownership or control, location, or name will be made pursuant to a separate process, as required under 935 CMR 500.104(1), and none of those changes have occurred in this application.:

I certify that to the best knowledge of any of the individuals listed within this application, there are no background events that have arisen since the issuance of the establishment's final license that would raise suitability issues in accordance with 935 CMR 500.801.:

I certify that all information contained within this renewal application is complete and true.:

### ADDITIONAL INFORMATION NOTIFICATION

#### Notification:

### COMPLIANCE WITH POSITIVE IMPACT PLAN - PRE FEBRUARY 27, 2024

No records found

### COMPLIANCE WITH DIVERSITY PLAN

No records found

### HOURS OF OPERATION

Monday From: 10:00 AM	Monday To: 10:00 PM
Tuesday From: 10:00 AM	Tuesday To: 10:00 PM
Wednesday From: 10:00 AM	Wednesday To: 10:00 PM
Thursday From: 10:00 AM	Thursday To: 10:00 PM
Friday From: 10:00 AM	Friday To: 10:00 PM
Saturday From: 10:00 AM	Saturday To: 10:00 PM
Sunday From: 10:00 AM	Sunday To: 8:00 PM

## **Plan to Remain Compliant with Local Zoning**

The purpose of this plan is to outline Surf's Up Cannabis Ventures, LLC ("Surf's Up") is, and will remain in compliance with, local codes, ordinances, and bylaws for the physical address of 770 Gallivan Boulevard, Dorchester, MA 02122 which shall include, but not be limited to, the identification of any local licensing requirements for the adult use of marijuana.

The facility at 770 Gallivan Boulevard is in Commercial Property / Office 1-2 Story Zone (Classification Code 0343) and properly zoned pursuant to the City of Boston Text Amendment NO. 432, specifically Section 8-7. In accordance with the City of Boston's zoning ordinance and as determined by the Boston Zoning Board of Appeals, the address is not located within one half mile or 2,640 feet from another existing cannabis establishment, specifically a marijuana retail facility serving medical use patients or adult-use customers and it is at least 500 feet from a pre-existing public or private school providing education in kindergarten or any of grades 1 through 12. This distance is measured from the nearest lot line of the proposed establishment to the nearest lot line of existing establishment or school.

Surf's Up submitted its plans to ISD and filed an appeal with the ZBA on June 1, 2022 (Appeal #ALT1341252). On August 17, 2022, Surf's Up received its refusal letter from ISD. Surf's Up submitted its Boston Cannabis Board application to the City of Boston on November 4, 2022.

On March 14th, 2023, Surf's Up appeared before Boston Cannabis Board for an application approval for a marijuana retailer and product manufacturing establishment license in Boston.

In addition to Surf's Up remaining compliant with existing Zoning Ordinances; Surf's Up will continuously engage with City of Boston officials to remain up to date with local zoning ordinances to remain fully compliant.

**CEDAR GROVE**  
CIVIC ASSOCIATION

October 26, 2022

City of Boston Cannabis Board  
City Hall  
Boston, MA

RE: Proposed Adult Use Cannabis Dispensary at 770 Gallivan Boulevard

Dear Madam Chairperson and Members of the Board,

The Cedar Grove Civic Association (CGCA) is writing with regard to the proposed cannabis dispensary to be located at 770 Gallivan Boulevard in Dorchester's Ward 16 to be operated by Surf's Up Cannabis Ventures, LLC.

The CGCA hosted the operations team, as well as representatives of the property owner, at two meetings of our general membership where they provided information about their proposal and business. We have come to an agreement with them on a community benefits package, and through extensive discussion, believe that they will be responsible operators of an adult use cannabis dispensary in our community. Our general membership voted on October 25, 2022 to support the concept by a vote of 61% to 39%.

In accordance with that vote, our community is supportive of the proposal.

Sincerely,



Steve Bickerton, Jr.  
President

CC: Mayor Michelle Wu via George Huynh, ONS  
Councilor Frank Baker, District 3  
City of Boston Zoning Board of Appeals via Stephannie Haynes, ISD



**FRANK BAKER**  
**BOSTON CITY COUNCILOR**  
**DISTRICT 3**

February 8, 2023

Boston Cannabis Board  
One City Hall Plaza, Room 809  
Boston, MA 02201

To Whom It May Concern,

I am writing in support of Surf's Up Cannabis Ventures, LLC and their application for a proposed cannabis dispensary. The proposed location would be at 770 Gallivan Boulevard in Dorchester.

As the Boston City Councilor for District 3, for which this location will sit, I am writing in support, with the condition that the applicant continue to work with the community on any concerns they may have. The applicants, twice, attended the Cedar Grove Civic Association (CGCA), where CGCA voted to support. The applicant also held a Mayor's Office of Neighborhood Services abutters meeting on January 18, 2023, in which my office attended. For these reasons, I write this letter in support.

Thank you for your time and attention to this matter. Please do not hesitate to contact me directly if you have any questions or concerns.

Sincerely,

**Frank Baker**  
Boston City Councilor, District 3

City of Boston and Surf's Up Cannabis Venture, LLC d/b/a Surf's Up Cannabis Co.

HOST COMMUNITY AGREEMENT

April ← This Host Community Agreement ("Agreement") is made and entered into on the 7<sup>th</sup> day of ~~March~~ 2023, by and between the City of Boston, Massachusetts ("City" or "Boston") and Surf's Up Cannabis Venture, LLC d/b/a Surf's Up Cannabis Co. ("Company") and (collectively the "Parties").

WHEREAS, the Company wishes to operate as a Co-located Medical and Recreational Cannabis Dispensary License by receipt of a license from the Commonwealth of Massachusetts' Cannabis Control Commission ("CCC") within the City, in accordance with 935 CMR 500.000 et seq & 935 CMR 501.000 et seq .;

WHEREAS, The Parties understand and acknowledge that the Company intends to locate and operate as a Co-located Medical and Recreational Cannabis Dispensary License at 770 Gallivan Boulevard, Dorchester 02122;

WHEREAS, the Company endeavors to function as a responsible corporate citizen and contributing member of the business community as it builds and sustains its business in the City;

NOW THEREFORE, in consideration of the provisions of this Agreement, the Company and the City agree to the following:

1. Definitions. As used in this Agreement, terms shall have the following meaning:

a. Marijuana Establishment means a Medical Marijuana Treatment Center, Registered Marijuana Dispensary, Marijuana Cultivator, Craft Marijuana Cooperative, Marijuana Product Manufacturer, Marijuana Retailer, Independent Testing Laboratory, Marijuana Research Facility, Marijuana Transporter, Marijuana Delivery Operator, Marijuana Courier or any other type of licensed marijuana-related establishment seeking to conduct business within the City.

b. Gross Sales Revenue means the total revenue actually derived from cultivation, manufacturing, processing and/or sales of marijuana and marijuana related products at the Marijuana Establishment.

c. Calendar Year means a period of days running from January 1st until and through December 31st of the same year.

d. Commencement Date means the date the Company commences sales at its Marijuana Establishment.

2. Payment. In the event that the Company obtains a license from the CCC for the operation of a Marijuana Establishment in the City and the Company receives any and all necessary and required permits and licenses issuable by the City, which said permits and/or licenses allow the company to locate, occupy and operate the Marijuana Establishment, the Company shall make payments to the City as follows:

Should the City determine that it has incurred community impact or impacts arising primarily from the Company's operation, the City reserves the right to collect from the Company the full cost of such impact or impacts, not to exceed 3% of the Company's annual gross revenues. Any cost imposed under this section shall be documented by the City and transmitted to the licensee not later than one month after the date of the annual renewal of a final license to operate the marijuana establishment, and shall not be effective after the marijuana establishment's eighth year of operation. To the extent that the Company claims any fees imposed exceed the 3% limit, it shall provide documentation proving such claim.

3. Obligations of the City. The City shall work cooperatively and in good faith with the Company as the Company progresses through the City's permitting process.

This Agreement does not affect, limit, or control the authority of any City department, including boards and commissions, to carry out their respective duties in deciding whether to issue or deny any necessary local permits or licenses pursuant to state or local law, ordinance, or regulation and collect appropriate fees and fines related to local permits and licenses. By entering into this Agreement the City is not required to issue such permits or licenses.

All rights and obligations under this Agreement are expressly conditioned upon the Company's receipt of Final Licenses allowing for their operation of a Marijuana Establishment within the City, and upon Company obtaining all local approvals. If Company fails to secure any of the Final Licenses, or any of the required local approvals aforementioned, this Agreement shall be null and void; provided that the Company is able to exercise all available rights and due-process for securing said Final Licenses or local approvals.

4. Taxes. At all times during the Term of this Agreement, property, both real and personal, owned or operated by the Company shall be treated as taxable, and all applicable real estate and personal property taxes for that property shall be paid either directly by the Company or by its landlord, and neither the Company nor its landlord shall object or otherwise challenge the taxability of such property and shall not seek a non-profit exemption from paying such taxes. Notwithstanding the foregoing, (i) if real or personal property owned, leased or operated by the Company is determined to be non-taxable or partially non-taxable, or (ii) if the value of such property is abated with the effect of reducing or eliminating the tax which would otherwise be paid if assessed at fair cash value as defined in G.L. c. 59, §38, or (iii) if the Company is determined to be entitled or subject to exemption with the effect of reducing or eliminating the tax which would otherwise be due if not so exempted, then the Company shall pay to the City an amount which when added to the taxes, if any, paid on such property, shall be equal to the taxes which would have been payable on such property at fair cash value and at the otherwise applicable tax rate, if there had been no abatement or exemption; this payment shall be in addition to the payment made by the Company under Section 2 of this



Agreement. Nothing in this section shall in any way limit or prevent the Company from challenging the valuation of its property before the Board of Assessors or at the Appellate Tax Board. All taxes and charges owed to the City must be paid on a current basis. The City may place a lien on the property of any person who has an outstanding balance due the City from any fee, charge or tax, which balance is at least six (6) months past due.

5. Term and Termination. This agreement shall take effect on the above written date, subject to the contingencies noted herein. This agreement shall continue in effect for so long as the Company operates as either a Medical or Recreational Cannabis Dispensary or a Co-located Medical and Recreational Dispensary under their License within the City, or eight (8) years from the commencement date, whichever is earlier. At the conclusion of the term of this agreement, the Parties shall renegotiate a new Host Community Agreement in accordance with the prevailing regulations and laws as such regulations may be amended or replaced. If the Company seeks to change its business operations, including but not limited to the addition of delivery services, at this site the Company agrees to comply with the established City process relative to a cannabis related establishment, including but not limited to, notice to abutters, a community outreach meeting and City review process and, if approved, to renegotiate a new Host Community Agreement. In the event that the Company no longer does business in the City or in any way loses or has its license revoked by the Commonwealth and/or the Boston Cannabis Board, this agreement shall become null and void; however, the Company will be responsible for any payment due under section 2 above. In the event that the Company wishes to transfer ownership of the Company, any such proposed changes must be approved by the Boston Cannabis Board.

6. Appropriation. The purpose of this agreement is to assist the City in addressing the costs imposed upon the City by the operation of the Marijuana Establishment.

7. Security. The Company shall maintain security at the Marijuana Establishment in accordance with the security plan presented to the City and included as part of their application to the Cannabis Control Commission. Said security plan shall take into account the unique operational concerns particular to the Marijuana Establishment at the proposed location as well as all applicable laws and regulations.

8. Signage. The Company will limit signage for the Marijuana Establishment to the extent that such signage is inconsistent with applicable statutes and regulations, and to the extent that such signage is inconsistent with the look and character of the surrounding area and/or injurious to the neighborhood.

9. Hours of Operation. The Company agrees to the following operating hours for the public: 10:00am-10:00pm Monday-Saturday & 10:00am-8:00pm Sunday a week unless otherwise changed by the Boston Cannabis Board.

10. To the extent that such a practice and its implementation are consistent with federal and state laws and regulations, the Company will work in a good faith, legal and nondiscriminatory manner to give reasonable preference in the hiring of employees for the site to qualified Boston

residents. In addition, the Company shall endeavor to establish a diversity and inclusion plan aimed at creating increased opportunities for people of color, women, and M/WBEs to participate in the development of the site, including but not limited to, meaningful participation by people of color, women, and M/WBEs in the following professional fields: construction; design; development; financing; operations; and ownership.

A Minority Business Enterprise or "MBE" is a firm that is owned, operated, and controlled by one or more individuals who are African American, Hispanic American, Native American, or Asian American who have at least 51% ownership of the firm.

A Woman Business Enterprise or "WBE" is a firm that is owned, operated, and controlled by one or more women who has or have at least 51% ownership of the firm.

11. The terms of this Agreement will not constitute a waiver of the City's regulatory authority or of the Company's applicant responsibilities not otherwise addressed by this Agreement.

12. Events of Default. The Company shall be deemed to have committed an event of default if any of the following occur:

- a. The Company fails to obtain, and maintain in good standing, all necessary local licenses and permits for the Marijuana Establishment, provided that the Company is able to exercise all available rights and due-process for maintaining in good standing said licenses and permits;
- b. The Company ceases to operate as a Marijuana Establishment without notifying the City; and
- c. The Company fails to make payments to the City as required under this Agreement, and such failure remains uncured with reasonable written notice from the City for thirty (30) days.

13. In the event that the Cannabis Control Commission and/or the Boston Cannabis Board suspends or revokes the Company's license, the City may also declare an event of default and terminate this Agreement, provided that the Company is able to exercise all available rights and due-process for maintaining in good standing said licenses. The Company shall be required to pay any amounts due upon the termination date; such amount to be determined by the period of operation of the Marijuana Establishment within the city.

14. The City may terminate this Agreement upon the occurrence of any event of default, and in the event the Company fails to cure said default in a commercially reasonable time.

15. Termination for Cause. The City may terminate this Agreement for cause at any time by giving at least thirty (30) days' notice, in writing, to the Company. Cause is defined as the Company's violation of any applicable laws of the Commonwealth, or local ordinances and regulations, with respect to the operation of a Marijuana Establishment in the City of Boston. Notwithstanding the above, the Company shall not be relieved of liability to the City for

damages sustained by the City for personal injury or property damage by virtue of any termination of the Agreement.

16. This Agreement is not intended to, nor shall it be construed to, create any rights in any third parties.

17. Governing Law. This Agreement shall be governed by and construed in accordance with the laws of the Commonwealth of Massachusetts. All legal disputes shall be resolved in the Courts of the Commonwealth of Massachusetts and the Company submits to the jurisdiction of the Trial Court for Suffolk County for the adjudication of disputes arising out of this Agreement.

18. Assignment. Neither party may assign its rights or delegate its obligations under this Agreement without the prior written consent of the other party.

19. Severability. If any provision of this Agreement shall be held by a court of competent jurisdiction to be contrary to law, that provision will be enforced to the maximum extent permissible and the remaining provisions of this Agreement will remain in full force and effect, unless to do so would result in either party not receiving the benefit of its bargain.

20. Headings. Section headings in this Agreement are inserted for convenience of reference only and shall in no way affect, modify, define or be used in construing the text of the Agreement. Where the context requires, all singular words in the Agreement shall be construed to include the masculine and feminine forms of such words.

21. Modifications. Modifications to this Agreement may be effective only if made in writing and signed by both Parties.

22. Counterparts. This Agreement may be executed in one or more counterparts each of which shall be deemed an original. The facsimile or PDF signatures of the parties shall be deemed to constitute original signatures.

23. Additional Items. (i) This agreement shall be subject to all conditions imposed upon the License as issued by the Boston Cannabis Board, such conditions being subject to amendment by the BCB from time to time; (ii) there will be no benches in or around the business; (iii) the Company agrees to prohibit smoking, vaping or any other form of consumption of marijuana on site unless specifically allowed by amendment to this agreement; (iv) the Company agrees to assist in the dissemination of communications materials related to public health, public safety and prevention efforts and work with the City and the public health community on efforts associated with prevention.

24. Executive Order. The Company acknowledges its compliance with the Executive Order of the City of Boston, dated September 13, 2019, which states: "No City of Boston employee or immediate family member may participate in a marijuana business that is currently seeking, or intends to seek, an approval from the City of Boston or its agencies. No member of the Zoning

Board of Appeal, the Boston Licensing Board, the Boston Public Health Commission, the Boston Zoning Commission, the Boston Redevelopment Authority d/b/a the Boston Planning and Development Agency, or their immediate family members, may participate in a marijuana business that is currently seeking, or intends to seek, an approval from the City of Boston, or its agencies.”

This Agreement shall be binding upon and shall inure to the benefit of the Parties, their respective heirs, executors, administrators and assigns.

The company hereby certifies that the information supplied to the City during the application process and the information contained in this Agreement is accurate and that the provision of false or misleading information may subject the applicant to sanctions, up to and including revocation of a host community agreement.

**CITY OF BOSTON**

**Surf's Up Cannabis Venture, LLC**



Jasmin Winn  
Cannabis Board Manager  
Boston Cannabis Board



By:  
Title: CO-Founder Partner  
Richard Parsons

4/7/23

Approved as to Form:



Thomas J. Broom  
Assistant Corporation Counsel

# CLASSIFIED

classifiedads@bostonherald.com  
(617) 423-4545

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## LEGAL NOTICES

## LEGAL NOTICES

## LEGAL NOTICES

### NOTICE OF MORTGAGEE'S SALE OF REAL ESTATE

By virtue and in execution of the Power of Sale contained in a certain mortgage dated August 10, 2021 by Emmy 120 LLC to Steven A. Ross, Trustee of QS Lending Trust u/d/t dated January 27, 2020 (recorded in Book 62568, Page 328), said mortgage recorded with the Suffolk County Registry of Deeds in Book 66069, Page 28, and which mortgage the undersigned is the present holder, for breach of the conditions of said mortgage and for the purpose of foreclosing the same will be sold at Public Auction at **12:00 P.M. on the 20th day of December, 2023** at 120 Emerson Street, Boston, Massachusetts, all and singular the premises described in said mortgage.

To wit:  
Property Address: **120-126 Emerson Street, Boston, Massachusetts 02127**

A certain parcel of land with the buildings thereon situated in that part of Boston called South Boston and bounded and described as follows:

Beginning at the Northeasterly corner of said parcel at a point forty-eight (48) feet distant Westerly from I street and thence running in a

WESTERLY direction forty (40) feet to land now or formerly of Michael Hourihan; thence turning at a right angle and running,

SOUTHERLY by land now or formerly of Hourihan in a line parallel with I Street, fifty-one and 6/100 (51.06) feet to Emerson Street; thence turning and running,

SOUTHEASTERLY on Emerson Street, forty-three and 82/100 (43.82) feet; and thence turning and running,

NORTHERLY sixty-eight and 34/100 (68.34) feet by other land now or formerly of Hourihan to the point of beginning.

Meaning and intending to convey the same premises as described by Deed herewith [Book 66069, Page 24].

Premises to be sold and conveyed subject to and with the benefit of all rights, rights of way, restrictions, easements, covenants, liens or claims in the nature of liens, improvements, public assessments, any and all unpaid taxes, tax titles, tax liens, water and sewer liens and any other municipal assessments or liens and rights of any tenants and parties in possession, if there be any, or existing encumbrances of record which are in force and are applicable, having priority over said mortgage, whether or not reference to such restrictions, easements, improvements, liens or encumbrances is made in the deed. The successful bidder will pay all costs of recording the foreclosure deed and any other foreclosure documents including, without limitation, all state and county excise stamp fees, and shall also be responsible for any Title V inspection and repair requirements.

Terms of sale: A deposit of One Hundred Thousand and 00/100 Dollars (\$100,000.00) by certified or bank check will be required to be paid by the purchaser at the time and place of sale. The balance is to be paid by certified or bank check to Baker, Braverman & Barbadoro, P.C., 1200 Crown Colony Drive, Suite 610, Quincy, MA 02169 within thirty (30) days from the date of sale. Deed will be provided to purchaser for recording upon receipt in full of the purchase price. In the event of an error in this publication, the description of the premises contained in said mortgage shall control.

Other terms, if any, to be announced at the sale.

Steven A. Ross, Trustee of QS Lending Trust  
u/d/t dated January 27, 2020  
Present holder of said mortgage

By his Attorneys,  
Baker, Braverman & Barbadoro, P.C.  
1200 Crown Colony Drive, Suite 610  
Quincy, MA 02169

November 27 December 4 11

#NY0098967

### Notice of Self Storage Sale

Please take notice Prime Storage - South Boston - Old Colony Ave. located at 135 Old Colony Ave., South Boston, MA 02118 intends to hold an auction to sell the goods stored by the following tenants at the storage facility. The sale will occur as an online auction via [www.storagetreasures.com](http://www.storagetreasures.com) on 12/13/2023 at 12:00PM. Unless stated otherwise the description of the contents are household goods and furnishings. Kevin Berry unit #2615; Sam Anson unit #7794. All property is being stored at the above self-storage facility. This sale may be withdrawn at any time without notice. Certain terms and conditions apply. See manager for details.

Nov 27 Dec 4

## LEGAL NOTICES

## LEGAL NOTICES

### NOTICE OF MORTGAGEE'S SALE OF REAL ESTATE

By virtue and in execution of the Power of Sale contained in a certain mortgage given by Siobhan Carew and Stephen Sachetta, Trustee of 27 White Place Realty Trust, u/d/t dated January 13, 2012, to Four P's, Inc., dated December 2, 2015, and registered with the Norfolk County Registry District of the Land Court as Document No. 1343109, as noted on Certificate of Title No. 192320, of which mortgage the undersigned is the present holder, for breach of the conditions of said mortgage and for the purpose of foreclosing the same will be sold at Public Auction at 12:00 P.M. on the 18th day of December 2023, at 28 White Place, Brookline, MA 02445, all and singular the premises described in said mortgage,

To wit:

That certain parcel of land known as and numbered 28 White Place, Brookline, Norfolk County, Massachusetts.

Said parcel is shown on a plan drawn by Selwyn & Kirwin Associates, Surveyors, dated March 3, 1987, as modified and approved by the Land Court, filed in the Land Registration Office as No. 42124A, a copy of a portion of which is filed in Norfolk Registry District with Certificate No. 132439, Book 663.

There is appurtenant to the above-described land the right to use the Way, twelve feet in width, over adjoining land of Registration Case No. 42125, as shown on said plan, to and from said land and White Place as set forth in a deed given by Robert J. Stanfield et ux to Henry C. Phillips et ux, dated September 7, 1951, duly recorded in Book 3029, Page 471.

For title see Deed of Nancy B. Gardiner, Trustee of the BR Realty Trust u/d/t dated July 23, 2004, filed with Norfolk Registry District of the Land Court as Document No. 1035649, said deed dated October 19, 2015, filed with said Norfolk Registry District of the Land Court, Document No. 1343108, noted on Certificate of Title No. 192320

Meaning and intending to exclude and except from the foreclosure sale the portion of the mortgaged premises described as 27 White Place, Brookline, MA. The sale is only for 28 White Place, Brookline, MA.

Premises to be sold and conveyed subject to and with the benefit of all rights, rights of way, restrictions, easements, covenants, liens or claims in the nature of liens, improvements, public assessments, any and all unpaid taxes, tax titles, tax liens, water and sewer liens and any other municipal assessments or liens or existing encumbrances of record which are in force and are applicable, having priority over said mortgage, whether or not reference to such restrictions, easements, improvements, liens or encumbrances is made in the deed.

Terms of sale: A deposit of five thousand dollars (\$5,000) by certified or bank check will be required to be paid by the purchaser at the time and place of sale. The balance is to be paid by wire transfer to Demele Hoeger LLP, 10 City Square, 4th Floor, Boston, MA 02129 within thirty (30) days from the date of sale. Deed will be provided to purchaser for recording upon receipt in full of the purchase price. In the event of an error in this publication, the description of the premises contained in said mortgage shall control.

Other terms, if any, to be announced at the sale.

Four

P's, Inc.,  
Present holder of said mortgage,  
By its Attorneys,  
Demele Hoeger LLP  
10 City Square, 4th Floor  
Boston, MA 02129  
(617) 337-4444

November 27 December 4 11

#NY0098705

## LEGAL NOTICES

## LEGAL NOTICES

### 50202301 ADVERTISEMENT

BOSTON PUBLIC SCHOOLS  
OFFICE OF FACILITIES MANAGEMENT  
DEPARTMENT OF PLANNING & ENGINEERING

### INVITATION FOR BIDS

### Installation of Water Bottle Refill Stations - Package 8 at Various Schools

Contact Information  
Gifty Osei  
Bidderinfo@bostonpublicschools.org  
617-635-9135

The City of Boston Public Schools (the City), acting by and through its Director of Facilities Management (the awarding authority), invites sealed bids for the above-titled project, subject to the applicable provisions of the law, including, without limitation, section 39M of chapter 30 of the General Laws as amended, and by the terms and conditions of the law of the contract documents entitled: **"Installation of Water Bottle Refill Stations - Package 8 at Various Schools" at an estimated cost of \$670,000.**

PLANS AND SPECIFICATIONS will be available **after noon, November 22, 2023**, at the Office of Facilities Management, 1216 Dorchester Avenue, 2nd floor, Boston, MA 02125; no deposit is required. To request electronic copies, send an email to bidderinfo@bostonpublicschools.org.

Sub File bids shall be submitted to the Awarding Authority, 2nd floor, 1216 Dorchester Avenue, Boston, MA 02125, **before noon (Boston time) on Wednesday, December 6, 2023, and opened forthwith.** Filed Sub-Bid Trade(s): Electrical.

General Bids shall be submitted to the Awarding Authority, 2nd floor, 1216 Dorchester Avenue, Boston, MA 02125, **before noon (Boston time) on December 20, 2023, and opened forthwith.**

The scope of work is detailed in the bid package.

Lisa Hoang, Assistant Director  
(November 27, December 4, 2023)  
#NY0097565

### City of Newton Legal Notice

Monday, December 11, 2023

A Public Hearing will be held on Monday, December 11, 2023, at 7:00PM before the PLANNING AND DEVELOPMENT BOARD AND THE ZONING & PLANNING COMMITTEE of the Newton City Council for the purpose of hearing the following petition at which time all parties interested in this item shall be heard. Notice will be published Monday, November 27, 2023, and Monday, December 4, 2023 in The Boston Herald, with a copy posted online and in a conspicuous place at Newton City Hall.

**Please Note: This meeting will be virtual and can be attended by desktop, laptop, tablet or phone by visiting the following link: <https://newtonma.gov.zoom.us/j/85700543612>, or call 1-646-558-8656 and use the Meeting ID: 857 0054 3612. The final agenda will be posted online on Friday, December 8, 2023 at: <https://www.newtonma.gov/government/city-clerk/city-council/friday-package>. Please call the Clerk's Office at 617-796-1210 for more information.**

Copies of the proposed changes, maps, and accompanying materials are available at the City Clerk's office or can be found online at <https://www.newtonma.gov/government/city-clerk/city-council/council-standing-committees/zoning-planning-committee>

**#376-23 Petition to rezone lot on Dedham Street**

KATHERINE ADAMS petitioning to amend the City of Newton's Zoning Map by changing the current zoning of the property known and numbered 0 Dedham St Off, Newton, MA, and shown on the City of Newton Assessor's database as Section 83, Block 36, Lot 3A, currently zoned PUBLIC USE to SINGLE RESIDENCE 1.

November 27 December 4

#NY0098864

## LEGAL NOTICES

## LEGAL NOTICES

### Notice of Public Hearing

Monday, December 18, 2023  
On Intent to Demolish a Significant Building  
As Determined by the Medford Historical Commission

Notice is hereby given to the Public that a Notice of Intent to Demolish a Building has been submitted to the Medford Historical Commission for the total demolition of the dwelling located at 56 Wareham Street. The Commission has determined that the building meets the criteria of a significant building as defined in Section 48-77 of the Medford City Ordinances. In accordance with Section 48-78, the Commission is holding a public hearing on Monday, December 18, 2023 at 7pm to determine if the demolition of the building at 56 Wareham Street would be detrimental to the historical, cultural, or architectural heritage or resources of the City of Medford.

The meeting will be held remotely via Zoom and to view and participate in this hearing please use the following:

Access this meeting via Zoom remote videoconferencing:

Join Zoom Meeting:  
<https://zoom.us/j/96236192680>

Call in via phone:  
One tap mobile:  
+19292056099, 96236192680# US  
Dial in: +1 929 205 6099 US  
Meeting ID: 962 3619 2680

Access live stream:

The meeting will also be live streamed at <http://medford.vod.castus.tv/vod/index.php/?live:ch3>.

To participate while watching the livestream, questions and comments may be emailed during the hearing to [HistoricalCommission@Medford-MA.gov](mailto:HistoricalCommission@Medford-MA.gov). For information regarding this hearing, please visit [www.medfordhistoricalcommission.org](http://www.medfordhistoricalcommission.org). Comments may be submitted prior to the meeting in writing to [HistoricalCommission@Medford-MA.gov](mailto:HistoricalCommission@Medford-MA.gov).

December 4

#NY0099586

## LEGAL NOTICES

## LEGAL NOTICES

### Notice of Self Storage Sale

Please take notice Prime Storage - Malden located at 9 Linehurst Rd., Malden, MA 02148 intends to hold an auction to sell the goods stored by the following tenants at the storage facility. The sale will occur as an online auction via [www.storagetreasures.com](http://www.storagetreasures.com) on 12/13/2023 at 12:00PM. Unless stated otherwise the description of the contents are household goods and furnishings. James Connolly unit #00279; Stephen Brown unit #00307; Thiago Chyaramont unit #00336; Matthew Ahearn unit #00542; John Rivera unit #00563. All property is being stored at the above self-storage facility. This sale may be withdrawn at any time without notice. Certain terms and conditions apply. See manager for details.

Nov 27 Dec 4

## LEGAL NOTICES

## LEGAL NOTICES

### Notice of Self Storage Sale

Please take notice US Storage Centers - Needham located at 540 Hillside Ave., Needham, MA 02494 intends to hold an auction to sell the goods stored by the following tenants at the storage facility. The sale will occur as an online auction via [www.storagetreasures.com](http://www.storagetreasures.com) on 12/20/2023 at 10:00 AM. Unless stated otherwise the description of the contents are household goods and furnishings. In Francois Pierre unit #2023; Patricia Anne Taber units #3321 & #3412. All property is being stored at the above self-storage facility. This sale may be withdrawn at any time without notice. Certain terms and conditions apply. See manager for details.

Dec 4 11

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(800) 882-1211. Restrictions apply. Home delivery not available in all areas.  
Call for details.



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MORTGAGE FORECLOSURE

MORTGAGE FORECLOSURE

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MORTGAGE FORECLOSURE

LEGAL NOTICES

LEGAL NOTICES

LEGAL NOTICES

NOTICE OF MORTGAGEE'S SALE OF REAL ESTATE

By virtue and in execution of the Power of Sale contained in a certain mortgage given by 8-10 LEEDS LLC to Loan Funder LLC, Series 52442, dated May 5, 2023 and recorded with the Suffolk County Registry of Deeds ("Registry") in Book 68964, Page 163, of which mortgage the undersigned Loan Servicer, LLC ("Mortgagee") is the present holder by virtue of an Assignment of Mortgage recorded with the Registry in Book 69539, Page 29, for breach of the conditions of said mortgage and for the purpose of foreclosing same will be sold at public auction at 10:00 a.m. on December 19, 2023 on the mortgaged premises being known as 8 Leeds Street, South Boston, MA 02127, being all and singular the premises described in said mortgage to wit:

Those premises more commonly known as Units No. 1, No. 2 and No. 3 (the "Units"), in the Condominium known as 8 Leeds Street Condominium (the "Condominium") located at 8 Leeds Street, Boston, Suffolk County, Massachusetts, 02127, a condominium established pursuant to M.G.L., Chapter 183A, by Master Deed dated June 3, 1987 and recorded with the Suffolk County Registry of Deeds in Book 13747, Page 257 (the "Master Deed"), as amended of record, together with the benefit of any exclusive and non-exclusive right to use any parking spaces(s) and storage space(s) located within the common areas and facilities of the Condominium and appurtenant to the Units or used in connection therewith as set forth in said Master Deed.

The Units are more particularly described (1) in the Master Deed, (2) such site and floor plans as have been recorded therewith, (3) in the first Unit Deeds recorded at the Suffolk County Registry of Deeds thereof and on copies of such site and floor plans filed therewith. The Units are conveyed together with an undivided interest in the common areas and facilities of the Condominium as stated the Master Deed and any recorded amendments thereto, and the same percentage interest in the Organization of Unit Owners created by 8 Leeds Street Condominium Trust created by instrument recorded simultaneously with said Master Deed with the Suffolk County Registry of Deeds in Book 13747, Page 277.

Being the same premises as conveyed to the mortgagor by deed, dated May 4, 2023, recorded with the Registry in Book 68963, Page 272.

The Mortgagee reserves the right to postpone the sale to a later date by public proclamation at the time and date appointed for the sale and to further postpone to any adjourned sale date by public proclamation at the time and date appointed for the adjourned sale date.

The premises will be sold subject to and/or with the benefit of any and all restrictions, easements, improvements, covenants, municipal or zoning regulations or requirements, outstanding tax titles, condominium charges, fees, or assessments, municipal or other public or government taxes, assessments, outstanding orders of condition or any municipal requirements, and any liens or claims in the nature of liens, and existing encumbrances of record created prior to the mortgage, if any there be, and the rights of tenants and occupants of the premises, if any there be. No representation is made as to the status of any improvements on the mortgaged premises and the Buyer purchases subject to all requirements related thereto.

The premises are being sold with the express acknowledgement that the Mortgagee makes no representation or warranty as to the presence or absence as to any wetlands or environmental issue at all, or related to the septic or well systems, if any, or as to any contaminants or other substances, as noted under M.G.L. c. 21E or any other Massachusetts Statute, Code or Regulation does exist, the correction thereof will be at the Buyer's sole cost and expense, and shall be separate from the purchase price. The Buyer shall indemnify and hold harmless Mortgagee from any and all costs, expenses or liability related to any of the aforesaid.

No representations, express or implied, are made with respect to any matter concerning the premises, which will be sold "as-is".

TERMS OF SALE:

A deposit of \$25,000.00 shall be paid by the successful bidder to the Mortgagee in cash, by certified or by cashier's check at the time and place of the sale as a deposit. The successful bidder will be required to execute a Memorandum of Sale immediately after the close of the bidding. The balance of the purchase price shall be paid in cash, by certified check, by cashier's check, or other check satisfactory to Mortgagee's attorney within thirty (30) days thereafter at the offices of McCarter & English, LLP, attorneys for the Mortgagee, 265 Franklin Street, Boston, MA 02110, or elsewhere as agreed by the parties, in exchange for which and at such time and place, the deed shall be delivered to the purchaser for recording.

The Mortgagee reserves the right to amend the foregoing terms of sale by written or oral announcement made before the auction sale, during the sale thereof or at the commencement or during any postponed sale, the right to bid at the sale, to reject any and all bids, and to postpone the sale up until the time the property is declared sold by the auctioneer.

The description of the premises contained in said mortgage shall control in the event of an error in the Notice of Mortgagee's Sale or its publication.

OTHER TERMS TO BE ANNOUNCED AT THE TIME AND PLACE OF THE SALE.

Dated: November 24, 2023

Signed: Loan Servicer, LLC, present holder of said Mortgage,

By its Attorneys, McCarter & English, LLP

John M. Allen, Esq., Attorney for the Mortgagee

265 Franklin Street, Boston, MA 02110

jallen@mccarter.com,

(617) 449-6500

Nov 27, Dec 4 & 11, 2023

#NY0099012

NOTICE OF MORTGAGEE'S SALE OF REAL ESTATE

By virtue and in execution of the Power of Sale contained in a certain mortgage given by 8-10 LEEDS LLC to Loan Funder LLC, Series 52446, dated May 5, 2023 and recorded with the Suffolk County Registry of Deeds ("Registry") in Book 68964, Page 23, of which mortgage the undersigned Loan Servicer, LLC ("Mortgagee") is the present holder by virtue of an Assignment of Mortgage recorded with the Registry in Book 69539, Page 46, for breach of the conditions of said mortgage and for the purpose of foreclosing same will be sold at public auction at 10:30 a.m. on December 19, 2023 on the mortgaged premises being known as 10 Leeds Street, South Boston, MA 02127, being all and singular the premises described in said mortgage to wit:

Those premises more commonly known as Units No. 1, No. 2 and No. 3 (the "Units"), in the Condominium known as 10 Leeds Street Condominium (the "Condominium") located at 10 Leeds Street, Boston, Suffolk County, Massachusetts, 02127, a condominium established pursuant to M.G.L., Chapter 183A, by Master Deed dated June 3, 1987 and recorded with the Suffolk County Registry of Deeds in Book 13747, Page 209 (the "Master Deed"), as amended of record, together with the benefit of any exclusive and non-exclusive right to use any parking spaces(s) and storage space(s) located within the common areas and facilities of the Condominium and appurtenant to the Units or used in connection therewith as set forth in said Master Deed.

The Units are more particularly described (1) in the Master Deed, (2) such site and floor plans as have been recorded therewith, (3) in the first Unit Deeds recorded at the Suffolk County Registry of Deeds thereof and on copies of such site and floor plans filed therewith. The Units are conveyed together with an undivided interest in the common areas and facilities of the Condominium as stated the Master Deed and any recorded amendments thereto, and the same percentage interest in the Organization of Unit Owners created by 10 Leeds Street Condominium Trust created by instrument recorded simultaneously with said Master Deed with the Suffolk County Registry of Deeds in Book 13747, Page 229.

Being the same premises as conveyed to the mortgagor by deed, dated May 4, 2023, recorded with the Registry in Book 68964, Page 19.

The Mortgagee reserves the right to postpone the sale to a later date by public proclamation at the time and date appointed for the sale and to further postpone to any adjourned sale date by public proclamation at the time and date appointed for the adjourned sale date.

The premises will be sold subject to and/or with the benefit of any and all restrictions, easements, improvements, covenants, municipal or zoning regulations or requirements, outstanding tax titles, condominium charges, fees, or assessments, municipal or other public or government taxes, assessments, outstanding orders of condition or any municipal requirements, and any liens or claims in the nature of liens, and existing encumbrances of record created prior to the mortgage, if any there be, and the rights of tenants and occupants of the premises, if any there be. No representation is made as to the status of any improvements on the mortgaged premises and the Buyer purchases subject to all requirements related thereto.

The premises are being sold with the express acknowledgement that the Mortgagee makes no representation or warranty as to the presence or absence as to any wetlands or environmental issue at all, or related to the septic or well systems, if any, or as to any contaminants or other substances, as noted under M.G.L. c. 21E or any other Massachusetts Statute, Code or Regulation does exist, the correction thereof will be at the Buyer's sole cost and expense, and shall be separate from the purchase price. The Buyer shall indemnify and hold harmless Mortgagee from any and all costs, expenses or liability related to any of the aforesaid.

No representations, express or implied, are made with respect to any matter concerning the premises, which will be sold "as-is".

TERMS OF SALE:

A deposit of \$25,000.00 shall be paid by the successful bidder to the Mortgagee in cash, by certified or by cashier's check at the time and place of the sale as a deposit. The successful bidder will be required to execute a Memorandum of Sale immediately after the close of the bidding. The balance of the purchase price shall be paid in cash, by certified check, by cashier's check, or other check satisfactory to Mortgagee's attorney within thirty (30) days thereafter at the offices of McCarter & English, LLP, attorneys for the Mortgagee, 265 Franklin Street, Boston, MA 02110, or elsewhere as agreed by the parties, in exchange for which and at such time and place, the deed shall be delivered to the purchaser for recording.

The Mortgagee reserves the right to amend the foregoing terms of sale by written or oral announcement made before the auction sale, during the sale thereof or at the commencement or during any postponed sale, the right to bid at the sale, to reject any and all bids, and to postpone the sale up until the time the property is declared sold by the auctioneer.

The description of the premises contained in said mortgage shall control in the event of an error in the Notice of Mortgagee's Sale or its publication.

OTHER TERMS TO BE ANNOUNCED AT THE TIME AND PLACE OF THE SALE.

Dated: November 24, 2023

Signed: Loan Servicer, LLC, present holder of said Mortgage,

By its Attorneys, McCarter & English, LLP

John M. Allen, Esq., Attorney for the Mortgagee

265 Franklin Street, Boston, MA 02110

jallen@mccarter.com,

(617) 449-6500

Nov 27, Dec 4 & 11, 2023

#NY0099013

NOTICE OF MORTGAGEE'S SALE OF REAL ESTATE

By virtue and in execution of the Power of Sale contained in a certain mortgage given by 19 TP LLC to Loan Funder LLC, Series 38058, dated July 1, 2022 and recorded with the Suffolk County Registry of Deeds ("Registry") in Book 67904, Page 236, of which mortgage the undersigned Loan Servicer, LLC ("Mortgagee") is the present holder by virtue of an Assignment of Mortgage recorded with the Registry in Book 69511, Page 11, for breach of the conditions of said mortgage and for the purpose of foreclosing same will be sold at public auction at 10:00 a.m. on December 12, 2023 on the mortgaged premises being known as 19 Thomas Park, South Boston, MA 02127, being all and singular the premises described in said mortgage to wit:

The land with the buildings thereon, in that part of Boston, called South Boston, bounded and described as follows:

Beginning on a point on the Northwesterly Side of Thomas Park, distant eighty-six and 15/1110 (86.15) feet Southwesterly from Pacific Street, and from said point running

SOUTHWESTERLY on Thomas Park, twenty-three and 56/100 (23.56) feet; thence turning and running

NORTHWESTERLY on land of owner unknown, sixty-eight and 05/100 (68.05) feet; thence turning and running

NORTHEASTERLY twenty-three (23) feet; thence turning and running

SOUTHEASTERLY by a line to and through the middle of a partition wall, sixty-six and 50/100 (66.50) feet, to the point of beginning.

Being the same premises as conveyed to the mortgagor by deed, dated July 1, 2022, recorded with the Registry in Book 67904, Page 230.

The Mortgagee reserves the right to postpone the sale to a later date by public proclamation at the time and date appointed for the sale and to further postpone to any adjourned sale date by public proclamation at the time and date appointed for the adjourned sale date.

The premises will be sold subject to and/or with the benefit of any and all restrictions, easements, improvements, covenants, municipal or zoning regulations or requirements, outstanding tax titles, condominium charges, fees, or assessments, municipal or other public or government taxes, assessments, outstanding orders of condition or any municipal requirements, and any liens or claims in the nature of liens, and existing encumbrances of record created prior to the mortgage, if any there be, and the rights of tenants and occupants of the premises, if any there be. No representation is made as to the status of any improvements on the mortgaged premises and the Buyer purchases subject to all requirements related thereto.

The premises are being sold with the express acknowledgement that the Mortgagee makes no representation or warranty as to the presence or absence as to any wetlands or environmental issue at all, or related to the septic or well systems, if any, or as to any contaminants or other substances, as noted under M.G.L. c. 21E or any other Massachusetts Statute, Code or Regulation does exist, the correction thereof will be at the Buyer's sole cost and expense, and shall be separate from the purchase price. The Buyer shall indemnify and hold harmless Mortgagee from any and all costs, expenses or liability related to any of the aforesaid.

No representations, express or implied, are made with respect to any matter concerning the premises, which will be sold "as-is".

TERMS OF SALE:

A deposit of \$25,000.00 shall be paid by the successful bidder to the Mortgagee in cash, by certified or by cashier's check at the time and place of the sale as a deposit. The successful bidder will be required to execute a Memorandum of Sale immediately after the close of the bidding. The balance of the purchase price shall be paid in cash, by certified check, by cashier's check, or other check satisfactory to Mortgagee's attorney within thirty (30) days thereafter at the offices of McCarter & English, LLP, attorneys for the Mortgagee, 265 Franklin Street, Boston, MA 02110, or elsewhere as agreed by the parties, in exchange for which and at such time and place, the deed shall be delivered to the purchaser for recording.

The Mortgagee reserves the right to amend the foregoing terms of sale by written or oral announcement made before the auction sale, during the sale thereof or at the commencement or during any postponed sale, the right to bid at the sale, to reject any and all bids, and to postpone the sale up until the time the property is declared sold by the auctioneer.

The description of the premises contained in said mortgage shall control in the event of an error in the Notice of Mortgagee's Sale or its publication.

OTHER TERMS TO BE ANNOUNCED AT THE TIME AND PLACE OF THE SALE.

Dated: November 16, 2023

Signed: Loan Servicer, LLC, present holder of said Mortgage,

By its Attorneys,

McCarter & English, LLP

John M. Allen, Esq.

Attorney for the Mortgagee

265 Franklin Street

Boston, MA 02110

jallen@mccarter.com

(617) 449-6500

November 20 27 December 4

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**ADVICE**

# How to make liberal arts degree count in workplace

By **Nerdwallet**

[wordpress@medianewsgroup.com](mailto:wordpress@medianewsgroup.com)

Majoring in science, technology, engineering and mathematics (STEM) isn't the only way to land a job that makes college worth it.

A liberal arts degree can pay off, too — but you may need to put in more legwork than a STEM major would.

“Going to school and being a liberal arts major in and of itself is not going to give you the same outcomes as focusing on your career preparation in tandem with going through your college experience,” says Joshua Kahn, associate director of research and public policy at the National Association of Colleges and Employers (NACE).

If you want to major in English, history, sociology or another non-technical field, here are some expert-approved tips to help make your liberal arts degree pay off.

### Do your research

Before deciding on a college or specific degree program, research your post-diploma employment and salary prospects.

“Check out the schools that have really good internship rates for liberal arts majors,” Kahn says. “Ask about resources at their career center, and what they’re specifically doing for liberal arts majors.”

### Start career planning early

“Career-readiness is really an ongoing process. It’s not a one-time thing, so I think it’s really

important for students to start out early,” says Leigh Anne Byrd, assistant director of career development and college relations at Virginia Tech, a large public university.

Work with a career counselor at your university or reach out to alumni for informational interviews about their jobs. And while researching, remember that your future career doesn’t need to align perfectly with your major — especially in the liberal arts.

“A student might think that, as a history major, maybe they need to go into education, but history majors can work in the media, they can work in business, they can do nonprofit work, they can work in the government or law,” Byrd says.

### Get internship and work experience

An internship helps you build a resume, professional network and new skills.

“Employers say that students with these experiential learning and internship opportunities are deciding factors for them when they’re making selections of who their hires should be,” Kahn says.

### Consider a second major, minor or certificate

While liberal arts majors have strong long-term salary prospects, STEM students earn more straight out of school: 99 of the top 100 programs that lead to the highest average salaries in the

four years after graduation are in STEM, finance or economics, according to an April 2023 College Scorecard analysis of 36,000 undergraduate programs.

If you major in a liberal arts field, adding a second major, minor or professional certificate in a more technical subject could give you the biggest payoff.

Even if you don’t pursue a formal STEM certification as a liberal arts student, take as many elective classes as you can in areas like statistics, artificial intelligence and coding, says Mark Schneider, director of the Education Department’s Institute of Education Sciences.

“You have to follow your passion, but you better have some skills to put bread on the table,” Schneider says.

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### PROFESSIONAL

Project Consultant, Simpson Gumpertz & Heger, Inc., Waltham, MA: Multiple openings. Structural Engineering Division. Provide structural engineering services. Requires: MS in Civil/Structural Engr. & 2 yrs' exp. in structural analysis & design of concrete, steel, masonry, & wood-frame structures. Stated exp. must include: communicating w/ internal & external clients; and using detailed analysis to solve complex problems. Must have working knowledge of Autodesk AutoCAD or Revit & structural analysis s/w (e.g., ETABS, SAP, RISA, RAM Structural System, SAFE, etc.) as demonstrated during job interview. Must be willing to periodically travel to out-of-state jobsites. Eligible to telecommute 1 day/wk from home w/in normal commuting distance of Waltham, MA. Send resume to [jobs@sgh.com](mailto:jobs@sgh.com).

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### GENERAL

Forrester Research, Inc. has an opening in our Cambridge, MA location for a DevOps Engineer II to work as part of a collaborative DevOps team providing ongoing technical support and improvements across all Forrester applications infrastructure. Telecommuting permitted up to 100%. How to apply: Email resume, incl. job history to [Ty.Milton@forrester.com](mailto:Ty.Milton@forrester.com) referencing FR 12122.79. EOE.

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## MORTGAGE FORECLOSURE

## MORTGAGE FORECLOSURE

## MORTGAGE FORECLOSURE

**192 Chestnut Street, Chelsea, MA  
MORTGAGEE'S SALE OF REAL ESTATE**

By virtue and in execution of the Power of Sale contained in a certain mortgage given by Alba Corona-Perez to "MERS", Mortgage Electronic Registration Systems, Inc., a separate corporation that is acting solely as nominee for GreenPoint Mortgage Funding, Inc., "Lender"; and its successors and assigns dated January 31, 2003 and recorded with the Suffolk County Registry of Deeds, in Book 30482, Page 33, as may be affected by Loan Modification Agreement dated April 14, 2015 and recorded with said Registry in Book 54772, Page 145, as assigned by Assignment of Mortgage dated December 15, 2008; recorded in Suffolk County Registry of Deeds, Book 44505, Page 18, and by Assignment dated April 9, 2012; recorded in Suffolk County Registry of Deeds, Book 49443, Page 209 and by Assignment dated March 2, 2022; recorded in Suffolk County Registry of Deeds, Book 67258, Page 65, of which mortgage the undersigned is the present holder, for breach of the conditions of said and for the purpose of foreclosing the same will be sold at **Public Auction at 11:00 AM, on December 11, 2023, on the premises known as 192 Chestnut Street, Chelsea, Massachusetts**, the premises described in said mortgage, together with all the rights, easements, and appurtenances thereto, to wit:

The land in said Chelsea with the buildings thereon, now known in the present street numbering as 192 Chestnut Street, Suffolk County, Massachusetts.

And being shown as Lot G on a plan recorded with Suffolk Deeds in Book 3393, Page 516, bounded and described as follows: Southeasterly by Chestnut Street, twenty-eight and 38/100 (28.38) feet; Northeasterly by Lot F, as shown on said plan, seventy-seven (77) feet; Northwesterly by Lots A and B on said plan, twenty-eight and 38/100 feet; and Southwesterly by land of owners unknown, seventy-seven (77) feet. Terms of Sale: These premises are being sold subject to any and all unpaid real estate taxes, water rates, municipal charges and assessments, condominium charges, expenses, costs, and assessments, if applicable, federal tax liens, partition wall rights, statutes, regulations, zoning, subdivision control, or other municipal ordinances or bylaws respecting land use, configuration, building or approval, or bylaws, statutes or ordinances regarding the presence of lead paint, asbestos or other toxic substances, sanitary codes, housing codes, tenancy, and, to the extent that they are recorded prior to the above mortgage, any easements, rights of way, restrictions, confirmation or other matters of record.

Purchaser shall also bear all state and county deeds excise tax. The deposit of \$10,000.00 is to be paid in cash or bank or certified check at the time and place of the sale, with the balance of the purchase price to be paid by bank or certified check within forty-five (45) days after the date of the sale, to be deposited in escrow with Guetta and Benson, LLC, at 73 Princeton Street, Suite 208, North Chelmsford, Massachusetts.

In the event that the successful bidder at the foreclosure sale shall default in purchasing the within described property according to the terms of this Notice of Sale and/or the terms of the Memorandum of Sale executed at the time of the foreclosure, the Mortgagee reserves the right to sell the property by foreclosure deed to the second highest bidder or, thereafter, to the next highest bidders, providing that said bidder shall deposit with said attorney, the amount of the required deposit as set forth herein within five (5) business days after written notice of the default of the previous highest bidder. Other terms, if any, are to be announced at the sale.

Dated: November 14, 2023

Present holder of said mortgage, MCLP Asset Company, Inc. by its Attorneys, Guetta and Benson, LLC, Peter V. Guetta, Esquire, P.O. Box 519, Chelmsford, MA 01824

November 20, 2023, November 27, 2023, December 4, 2023  
#NY0098172

## MORTGAGE FORECLOSURE

## MORTGAGE FORECLOSURE

## MORTGAGE FORECLOSURE

(SEAL)  
**COMMONWEALTH OF MASSACHUSETTS  
LAND COURT  
DEPARTMENT OF THE TRIAL COURT  
23 SM 004405  
ORDER OF NOTICE**

TO:

Amy E Lambroukos

and to all persons entitled to the benefit of the Servicemembers Civil Relief Act: 50 U.S.C. c. 50 § 3901 (et seq):

Citizens Bank, N.A. f/k/a RBS Citizens, N.A. s/b/m Citizens Bank of Massachusetts

claiming to have an interest in a Mortgage covering real property in Roxbury (Boston), numbered 99 East Brookline Street, Unit 3, South End Homes Condominium, given by Amy E. Lambroukos to Citizens Bank of Massachusetts, dated July 27, 2006, and recorded at Suffolk County Registry of Deeds in Book 40210, Page 141, has/have filed with this court a complaint for determination of Defendant's/Defendants' Servicemembers status.

If you now are, or recently have been, in the active military service of the United States of America, then you may be entitled to the benefits of the Servicemembers Civil Relief Act. If you object to a foreclosure of the above-mentioned property on that basis, then you or your attorney must file a written appearance and answer in this court at Three Pemberton Square, Boston, MA 02108 on or before January 15, 2024 or you may lose the opportunity to challenge the foreclosure on the grounds of noncompliance with the Act.

Witness, GORDON H. PIPER, Chief Justice of said Court on November 29, 2023.

Attest:

Deborah J. Patterson  
Recorder

Dec. 4, 2023

#NY0099390

## LEGAL NOTICES

## LEGAL NOTICES

76111500  
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BOSTON PUBLIC SCHOOLS  
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DEPARTMENT OF PLANNING &  
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INVITATION FOR BIDS  
**On-Call Clean-Out Services at Various  
BPS**

Contact Information  
Lisa Hoang  
Bidderinfo@bostonpublicschools.org  
617-518-8370

The City of Boston Public Schools (the City), acting by and through its Director of Facilities Management (the awarding authority), invites sealed bids for the above-titled project, subject to the applicable provisions of the law, including, without limitation, M.G.L. c.30B as amended, and by the terms and conditions of the law of the contract documents entitled: "**On-Call Clean-Out Services at Various Boston Public Schools.**"

The City intends to award up to 3 (three) contracts to the lowest and most responsible bidders.

PLANS AND SPECIFICATIONS will be available **after noon, November 20, 2023**, via the City's purchasing website ([boston.gov/procurement](http://boston.gov/procurement), click on "Go to Supplier Portal") under **Event ID EV00012905**.

GENERAL BIDS shall be submitted via the Supplier Portal or to the Awarding Authority, 2nd Floor, 1216 Dorchester Avenue, Boston, MA 02125, **before 12:00 PM (Boston time) on Monday, December 11, 2023**, and opened forthwith. Please submit your questions via email to [bidderinfo@boston-publicschools.org](mailto:bidderinfo@boston-publicschools.org).

The scope of work is detailed in the bid package.

Lisa Hoang, Assistant Director  
(November 27, December 4, 2023)  
(November 27, December 4, 2023)  
#NY0097997

## LEGAL NOTICES

## LEGAL NOTICES

Notice is hereby given that a Community Meeting for a Proposed Cannabis Establishment is scheduled for:  
**Application Name:** Surf's Up Cannabis Ventures LLC  
**Application Address:** 770 Gallivan Boulevard, Dorchester  
**License Type:** Recreational Retail Dispensary  
**Join virtually at the Zoom link below - this is NOT an in-person meeting:**  
**Date:** December 18th, 2023  
**Time:** 6:00PM  
**Link:** <https://us02web.zoom.us/join/register/tZcsd02apjsqH9Efr1-30q5VdsypUIsLyNLL>  
**Meeting ID:** 831 3428 0055  
**Event password:** 578113  
Hosted online per the Cannabis Control Commission 4/27/2020 administrative order.  
There will be an opportunity for the public to raise comments, questions, and concerns.  
**If you have any questions or comments about this proposal, please contact:** Richard Parsons  
Surf's Up Cannabis Ventures  
[richieparsons2002@yahoo.com](mailto:richieparsons2002@yahoo.com)  
December 4  
#NY0099268

## LEGAL NOTICES

## LEGAL NOTICES

## Notice of Self Storage Sale

Please take notice US Storage Centers - Middleton located at 193 S. Main St. Middleton MA 01949 intends to hold an auction to sell the goods stored by the following tenants at the storage facility. The sale will occur as an online auction via [www.storage-treasures.com](http://www.storage-treasures.com) on 12/20/2023 at 10:00AM. Unless stated otherwise the description of the contents are household goods and furnishings. Jose Quirindongo Rivera unit #T3605. All property is being stored at the above self-storage facility. This sale may be withdrawn at any time without notice. Certain terms and conditions apply. See manager for details.

Dec 4 11

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## PROBATE CITATIONS

## PROBATE CITATIONS

Commonwealth of  
Massachusetts The Trial Court Probate and Family  
Court Docket No. MI23P6292EA Middlesex Probate  
and Family Court 10-U Commerce Way, Woburn, MA  
01801 (781)865-4000 CITATION ON PETITION FOR  
FORMAL ADJUDICATION

Estate of: Selina Jo Woods Also known as: Selina J. Woods Date of Death: July 29, 2023 To all interested persons: A Petition for Formal Probate of Will with Appointment of Personal Representative has been filed by William A. Woods, Jr. of Winchester, MA requesting that the Court enter a formal Decree and Order and for such other relief as requested in the Petition.

The Petitioner requests that: William A. Woods, Jr. of Winchester, MA be appointed as Personal Representative(s) of said estate to serve Without Surety on the bond in Unsupervised Administration IMPORTANT NOTICE You have the right to obtain a copy of the Petition from the Petitioner or at the Court. You have a right to object to this proceeding.

To do so, you or your attorney must file a written appearance and objection at this Court before: 10:00 a.m. on the return day of 12/29/2023. This is NOT a hearing date, but a deadline by which you must file a written appearance and objection if you object to this proceeding. If you fail to file a timely written appearance and objection followed by an affidavit of objections within thirty (30) days of the return day, action may be taken without further notice to you. UNSUPERVISED ADMINISTRATION UNDER THE MASSACHUSETTS UNIFORM PROBATE CODE (MUPC) A Personal Representative appointed under the MUPC in an unsupervised administration is not required to file an inventory or annual accounts with the Court. Persons interested in the estate are entitled to notice regarding the administration directly from the Personal Representative and may petition the Court in any matter relating to the estate, including the distribution of assets and expenses of administration. WITNESS, Hon. Terri L. Klug Cafazzo, First Justice of this Court. Date: December 1, 2023. Tara E. DeCristofaro, Register of Probate  
December 4, 2023  
#NY0099578

## PROBATE CITATIONS

## PROBATE CITATIONS

Commonwealth of  
Massachusetts The Trial Court Probate and Family  
Court Docket No. MI23P5178EA Middlesex Probate  
and Family Court 10-U Commerce Way, Woburn, MA  
01801 (781)865-4000 CITATION ON PETITION FOR  
FORMAL ADJUDICATION

Estate of: Elizabeth M. Jolliffe Also known as: Betty Jolliffe Date of Death: 02/20/2023 To all interested persons: A Petition for Formal Probate of Will with Appointment of Personal Representative has been filed by Marianne Mahar of Bellingham, MA requesting that the Court enter a formal Decree and Order and for such other relief as requested in the Petition. The Petitioner requests that: Marianne Mahar of Bellingham, MA be appointed as Personal Representative(s) of said estate to serve Without Surety on the bond in Unsupervised Administration IMPORTANT NOTICE You have the right to obtain a copy of the Petition from the Petitioner or at the Court. You have a right to object to this proceeding.

To do so, you or your attorney must file a written appearance and objection at this Court before: 10:00 a.m. on the return day of 12/15/2023. This is NOT a hearing date, but a deadline by which you must file a written appearance and objection if you object to this proceeding. If you fail to file a timely written appearance and objection followed by an affidavit of objections within thirty (30) days of the return day, action may be taken without further notice to you. UNSUPERVISED ADMINISTRATION UNDER THE MASSACHUSETTS UNIFORM PROBATE CODE (MUPC) A Personal Representative appointed under the MUPC in an unsupervised administration is not required to file an inventory or annual accounts with the Court. Persons interested in the estate are entitled to notice regarding the administration directly from the Personal Representative and may petition the Court in any matter relating to the estate, including the distribution of assets and expenses of administration. WITNESS, Hon. Terri L. Klug Cafazzo, First Justice of this Court. Date: 11/30/2023. Tara E. DeCristofaro, Register of Probate  
12/4/2023  
#NY0099515

## PROBATE CITATIONS

## PROBATE CITATIONS

Commonwealth of Massachusetts  
The Trial Court  
Probate and Family Court  
Middlesex Division  
Docket No. MI23P5770EA

## INFORMAL PROBATE PUBLICATION NOTICE

Estate of: Caitlin Anne Kuhlman  
Also known as: Caitlin A. Kuhlman  
Date of Death: September 24, 2023

To all persons interested in the above captioned estate, by Petition of Petitioner Emily K. Bernier of Millis, MA, a Will has been admitted to informal probate. Emily K. Bernier of Millis, MA has been informally appointed as the Personal Representative(s) of the estate to serve without surety on the bond. The estate is being administered under informal procedure by the Personal Representative under the Massachusetts Uniform Probate Code without supervision by the Court. Inventory and accounts are not required to be filed with the Court, but interested parties are entitled to notice regarding the administration from the Personal Representative and can petition the Court in any matter relating to the estate, including distribution of assets and expenses of administration. Interested parties are entitled to petition the Court to institute formal proceedings and to obtain orders terminating or restricting the powers of Personal Representative(s) appointed under informal procedure. A copy of the Petition and Will, if any, can be obtained from the Petitioner.  
12/4/23  
#NY0099548

## PROBATE CITATIONS

## PROBATE CITATIONS

**Informal Probate Publication Notice**  
Commonwealth of Massachusetts  
The Trial Court  
Probate and Family Court  
Middlesex Division  
Docket No. MI23P5931EA

Estate of: Robert Stuart Clark  
Also Known As: Robert Stuart Clark, Jr.  
Robert S. Clark Robert S. Clark, Jr.  
Date of Death: September 24, 2023  
To all persons interested in the above captioned estate, by Petition of Petitioner Judith A. Clark of Reading MA a Will has been admitted to informal probate. Judith A. Clark of Reading MA has been informally appointed as the Personal Representative of the estate to serve without surety on the bond. The estate is being administered under informal procedure by the Personal Representative under the Massachusetts Uniform Probate Code without supervision by the Court. Inventory and accounts are not required to be filed with the Court, but interested parties are entitled to notice regarding the administration from the Personal Representative and can petition the Court in any matter relating to the estate, including distribution of assets and expenses of administration. Interested parties are entitled to petition the Court to institute formal proceedings and to obtain orders terminating or restricting the powers of Personal Representative(s) appointed under informal procedure. A copy of the Petition and Will, if any, can be obtained from the Petitioner.  
12/4/2023  
#NY0099138

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# Community Outreach Meeting Attestation Form

## Instructions

Community Outreach Meeting(s) are a requirement of the application to become a Marijuana Establishment (ME) and Medical Marijuana Treatment Center (MTC). 935 CMR 500.101(1), 500.101(2), 501.101(1), and 501.101(2). The applicant must complete each section of this form and attach all required documents as a single PDF document before uploading it into the application. If your application is for a license that will be located at more than one (1) location, and in different municipalities, applicants must complete two (2) attestation forms – one for each municipality. Failure to complete a section will result in the application not being deemed complete. Please note that submission of information that is “misleading, incorrect, false, or fraudulent” is grounds for denial of an application for a license pursuant to 935 CMR 500.400(2) and 501.400(2).

## Attestation

I, the below indicated authorized representative of that the applicant, attest that the applicant has complied with the Community Outreach Meeting requirements of 935 CMR 500.101 and/or 935 CMR 501.101 as outlined below:

1. The Community Outreach Meeting was held on the following date(s):
2. At least one (1) meeting was held within the municipality where the ME is proposed to be located.
3. At least one (1) meeting was held after normal business hours (this requirement can be satisfied along with requirement #2 if the meeting was held within the municipality and after normal business hours).



4. A copy of the community outreach notice containing the time, place, and subject matter of the meeting, including the proposed address of the ME or MTC was published in a newspaper of general circulation in the municipality at least 14 calendar days prior to the meeting. A copy of this publication notice is labeled and attached as “Attachment A.”

a. Date of publication:

b. Name of publication:

5. A copy of the community outreach notice containing the time, place, and subject matter of the meeting, including the proposed address of the ME or MTC was filed with clerk of the municipality. A copy of this filed notice is labeled and attached as “Attachment B.”

a. Date notice filed:

6. A copy of the community outreach notice containing the time, place, and subject matter of the meeting, including the proposed address of the ME or MTC was mailed at least seven (7) calendar days prior to the community outreach meeting to abutters of the proposed address, and residents within 300 feet of the property line of the applicant’s proposed location as they appear on the most recent applicable tax list, notwithstanding that the land of the abutter or resident is located in another municipality. A copy of this mailed notice is labeled and attached as “Attachment C.” Please redact the name of any abutter or resident in this notice.

a. Date notice(s) mailed:

7. The applicant presented information at the Community Outreach Meeting, which at a minimum included the following:

- a. The type(s) of ME or MTC to be located at the proposed address;
- b. Information adequate to demonstrate that the location will be maintained securely;
- c. Steps to be taken by the ME or MTC to prevent diversion to minors;
- d. A plan by the ME or MTC to positively impact the community; and
- e. Information adequate to demonstrate that the location will not constitute a nuisance as defined by law.

8. Community members were permitted to ask questions and receive answers from representatives of the ME or MTC.



Name of applicant:

Name of applicant's authorized representative:

Signature of applicant's authorized representative:



**770 Gallivan Boulevard Public Notice**

7 messages

**Ayah Roda** <ayah@bulfinchstrategies.com> Mon, Dec 4, 2023 at 10:17 AM  
 To: Public Notice <publicnotice@boston.gov>, Paul Flaherty <paul.j.flaherty@boston.gov>, Regine Desir <regine.desir@boston.gov>, Kellie Donovan <kellie.donovan@boston.gov>, Brianna Millor <Brianna.millor@boston.gov>, Jasmin Winn <jasmin.winn@boston.gov>, Ross Cochran <stephen.cochran@boston.gov>, Cannabis Board <cannabisboard@boston.gov>, Conor Newman <conor.newman@boston.gov>  
 Cc: Jefferson Smith <jefferson@bulfinchstrategies.com>, Jay Youmans <jay@bulfinchstrategies.com>

Good morning!

I hope all is well! I am requesting that a notice be posted today to conform with the City's open meeting requirements:

The following application has been confirmed for a Community Outreach Meeting for a proposed Cannabis Establishment:

This is an application by **Surf's Up Cannabis Venture LLC** for a **Recreational Retail Cannabis Dispensary**. License to be operated at the address of 770 Gallivan Boulevard in Dorchester - the scheduled date for the meeting will be on Monday, December 18th at 6PM.

It will not be an in-person meeting. Details are as follows:

- Date:** December 18th, 2023
- Time:** 6:00PM
- Link:** <https://us02web.zoom.us/join/9tZcsdO2qpjsqH9Efr1-3Oq5VdsypUlsLyNLL>
- Meeting ID:** 831 3428 0055
- Event password:** 578113

Thank you!

Ayah  
 --  
 Ayah Roda | Associate Director, Government Affairs | 617.721.8231 | [ayah@bulfinchstrategies.com](mailto:ayah@bulfinchstrategies.com) | [www.bulfinchstrategies.com](http://www.bulfinchstrategies.com)

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**Regine Desir** <regine.desir@boston.gov> Mon, Dec 4, 2023 at 10:28 AM  
 To: Ayah Roda <ayah@bulfinchstrategies.com>  
 Cc: Public Notice <publicnotice@boston.gov>, Paul Flaherty <paul.j.flaherty@boston.gov>, Kellie Donovan <kellie.donovan@boston.gov>, Brianna Millor <Brianna.millor@boston.gov>, Jasmin Winn <jasmin.winn@boston.gov>, Ross Cochran <stephen.cochran@boston.gov>, Cannabis Board <cannabisboard@boston.gov>, Conor Newman <conor.newman@boston.gov>, Jefferson Smith <jefferson@bulfinchstrategies.com>, Jay Youmans <jay@bulfinchstrategies.com>

Good Morning Ayah,  
 Can you send the word doc for this posting please

Best  
 Regine  
 [Quoted text hidden]  
 --



**Régine Désir, MCP**  
 Administrative Assistant  
 City of Boston: Office of the City Clerk  
 1 City Hall Square, Rm 601  
 Boston, MA 02201  
 Phone: 617-635-2047  
 Fax: 617-635-4658  
 Website: [www.boston.gov/city-clerk](http://www.boston.gov/city-clerk)

This email is subject to [MGL: Chapt.66, Sec.10 Public Records Law](#)

**Ayah Roda** <ayah@bulfinchstrategies.com> Mon, Dec 4, 2023 at 10:30 AM  
 To: Regine Desir <regine.desir@boston.gov>  
 Cc: Public Notice <publicnotice@boston.gov>, Paul Flaherty <paul.j.flaherty@boston.gov>, Kellie Donovan <kellie.donovan@boston.gov>, Brianna Millor <Brianna.millor@boston.gov>, Jasmin Winn <jasmin.winn@boston.gov>, Ross Cochran <stephen.cochran@boston.gov>, Cannabis Board <cannabisboard@boston.gov>, Conor Newman <conor.newman@boston.gov>, Jefferson Smith <jefferson@bulfinchstrategies.com>, Jay Youmans <jay@bulfinchstrategies.com>

Absolutely, see attached.

Ayah  
 [Quoted text hidden]



**Jasmin Winn** <jasmin.winn@boston.gov> Mon, Dec 4, 2023 at 11:02 AM  
 To: Ayah Roda <ayah@bulfinchstrategies.com>  
 Cc: Brianna Millor <Brianna.millor@boston.gov>, Cannabis Board <cannabisboard@boston.gov>, Conor Newman <conor.newman@boston.gov>, Jay Youmans <jay@bulfinchstrategies.com>, Jefferson Smith <jefferson@bulfinchstrategies.com>, Kellie Donovan <kellie.donovan@boston.gov>, Paul Flaherty <paul.j.flaherty@boston.gov>, Public Notice <publicnotice@boston.gov>, Regine Desir <regine.desir@boston.gov>, Ross Cochran <stephen.cochran@boston.gov>

Hi Ayah  
 Are you only moving forward with recreational? The BCB approved both recreational and medical. The flyer you proposing to be posted is only states recreational.

Thank you  
 Jasmin

On Mon, Dec 4, 2023 at 10:19 AM Ayah Roda <ayah@bulfinchstrategies.com> wrote:  
 [Quoted text hidden]

**Regine Desir** <regine.desir@boston.gov> Mon, Dec 4, 2023 at 11:05 AM  
 To: Jasmin Winn <jasmin.winn@boston.gov>  
 Cc: Ayah Roda <ayah@bulfinchstrategies.com>, Brianna Millor <Brianna.millor@boston.gov>, Cannabis Board <cannabisboard@boston.gov>, Conor Newman <conor.newman@boston.gov>, Jay Youmans <jay@bulfinchstrategies.com>, Jefferson Smith <jefferson@bulfinchstrategies.com>, Kellie Donovan <kellie.donovan@boston.gov>, Paul Flaherty <paul.j.flaherty@boston.gov>, Public Notice <publicnotice@boston.gov>, Ross Cochran <stephen.cochran@boston.gov>

Good Morning Jasmin and Ayah,  
 Should I wait to post this meeting ?

Best  
 [Quoted text hidden]  
 [Quoted text hidden]

**Jay Youmans** <jay@bulfinchstrategies.com> Mon, Dec 4, 2023 at 11:11 AM  
 To: Regine Desir <regine.desir@boston.gov>  
 Cc: Ayah Roda <ayah@bulfinchstrategies.com>, Brianna Millor <Brianna.millor@boston.gov>, Cannabis Board <cannabisboard@boston.gov>, Conor Newman <conor.newman@boston.gov>, Jasmin Winn <jasmin.winn@boston.gov>, Jefferson Smith <jefferson@bulfinchstrategies.com>, Kellie Donovan <kellie.donovan@boston.gov>, Paul Flaherty <paul.j.flaherty@boston.gov>, Public Notice <publicnotice@boston.gov>, Ross Cochran <stephen.cochran@boston.gov>

Hi all,  
 Recreational only for the moment as we await the CCC aligning regs with state statute to allow for standalone medical use retail licenses. As the CCC requires a public meeting within 6 months of an application submission, we will do another meeting at such time the CCC allows standalone medical. And we will of course coordinate with the BCB and ONS.

Does that help?  
 Yes, please do proceed with the notice as drafted.

Thank you!  
 Jay  
 [Quoted text hidden]

**Regine Desir** <regine.desir@boston.gov> Mon, Dec 4, 2023 at 11:22 AM  
 To: Jay Youmans <jay@bulfinchstrategies.com>  
 Cc: Ayah Roda <ayah@bulfinchstrategies.com>, Brianna Millor <Brianna.millor@boston.gov>, Cannabis Board <cannabisboard@boston.gov>, Conor Newman <conor.newman@boston.gov>, Jasmin Winn <jasmin.winn@boston.gov>, Jefferson Smith <jefferson@bulfinchstrategies.com>, Kellie Donovan <kellie.donovan@boston.gov>, Paul Flaherty <paul.j.flaherty@boston.gov>, Public Notice <publicnotice@boston.gov>, Ross Cochran <stephen.cochran@boston.gov>

Good Morning ,  
 The following meeting has been posted : <https://www.boston.gov/public-notice/16059146>  
 [Quoted text hidden]

# NOTICE OF PUBLIC MEETING

Notice is hereby given that a Community Meeting for a Proposed Cannabis Establishment is scheduled for:

**Application Name:** Surf's Up Cannabis Ventures LLC  
**Application Address:** 770 Gallivan Boulevard, Dorchester  
**License Type:** Recreational Retail Dispensary



**Join virtually at the Zoom link below - this is NOT an in-person meeting:**

**Date:** December 18th, 2023

**Time:** 6:00PM

**Link:** <https://us02web.zoom.us/join/tZcsdO2qpjsqH9Efr1-3Oq5VdsypUIsLyNLL>

**Meeting ID:** 831 3428 0055

**Event password:** 578113

*Hosted online per the Cannabis Control Commission 4/27/2020 administrative order*

There will be an opportunity for the public to raise comments, questions, and concerns.

**If you have any questions or comments about this proposal, please contact:**

Richard Parsons  
Surf's Up Cannabis Ventures  
[richieparsons2002@yahoo.com](mailto:richieparsons2002@yahoo.com)

Abutters Parcels 2023-3

OWNER	MAIL_ADDRESSEE	MAIL_STREET_ADDRESS	MAIL_CITY MAIL_STATE	MAIL_ZIP_CODE	New_Address
		11 CLOVER ST	DORCHESTER, MA	02122	11 Clover St Boston MA 02122
		PO BOX 262	NORWOOD, MA	02062	Gallivan Blvd Boston MA 02122
		12 Clover ST, Unit 2	DORCHESTER, MA	02122	12 Clover St 2 Boston MA 02122
		10 REV R M COSTELLO PL	DORCHESTER, MA	02122	Rev R M Costello Pl Boston MA 02122
		67 FRANCONIA ST	DORCHESTER, MA	02122	7 Clover St Boston MA 02122
		GALLIVAN BLVD	DORCHESTER, MA	02122	Gallivan Blvd Boston MA 02124
		3 DUNNS TE	DORCHESTER, MA	02122	3 Dunns Te Boston MA 02122
		3 REV R M COSTELLO PL	DORCHESTER, MA	02122	3 Rev R M Costello Pl Boston MA 02122
		815 GALLIVAN BL	DORCHESTER, MA	02122	413 Neponset Av Boston MA 02122
		69 SHELLTON RD	QUINCY, MA	02169	9 Rev R M Costello Pl Boston MA 02122
		126 BURROUGHS ROAD	BRAINTREE, MA	02122	5 Rev R M Costello Pl Boston MA 02122
		NEPONSET AVE	DORCHESTER, MA	02122	Neponset Av Boston MA 02122
		815 GALLIVAN BL	DORCHESTER, MA	02122	Gallivan Blvd Boston MA 02124
		7 REV R M COSTELLO PL	DORCHESTER, MA	02122	7 Rev R M Costello Pl Boston MA 02122
		12 CLOVER ST	DORCHESTER, MA	02122	12 Clover St Boston MA 02122
		3 REV R M COSTELLO PL	DORCHESTER, MA	02122	Rev R M Costello Pl Boston MA 02122
		10 CLOVER ST, Unit 3	DORCHESTER, MA	02122	10 Clover St 3 Boston MA 02122
		815 GALLIVAN BL	DORCHESTER, MA	02122	Gallivan Blvd Boston MA 02124
		8 REV R M COSTELLO PL	DORCHESTER, MA	02122	8 Rev R M Costello Pl Boston MA 02122
		80 NEPONSET AVE	DORCHESTER, MA	02122	Clover St Boston MA 02122
		PO BOX 262	NORWOOD, MA	02062	Minot St Boston MA 02122
		12 Clover ST, Unit 3	DORCHESTER, MA	02122	12 Clover St 3 Boston MA 02122
		27 HILLSIDE RD	WATERTOWN, MA	02472	10 Clover St Boston MA 02122
		16 MINOT ST	DORCHESTER, MA	02122	16 Minot St Boston MA 02122
		28 MINOT ST #2	DORCHESTER, MA	02122	28 Minot St Boston MA 02122
		20 MINOT ST	DORCHESTER, MA	02122	20 Minot St Boston MA 02122
		GALLIVAN BLVD	DORCHESTER, MA	02122	Gallivan Blvd Boston MA 02124
		9 WAVE AV #3	DORCHESTER, MA	02125	Dunns Te Boston MA 02122
		415 NEPONSET AVE	DORCHESTER, MA	02122	415 Neponset Av Boston MA 02122
		GALLIVAN BLVD	DORCHESTER, MA	02122	Gallivan Blvd Boston MA 02124
		4 REV R M COSTELLO PL	DORCHESTER, MA	02122	4 Rev R M Costello Pl Boston MA 02122
		600 RPOVIDENCE HWY	DEDHAM, MA	02026	748 Gallivan Blvd Boston MA 02122
		6 REV R M COSTELLO PL	DORCHESTER, MA	02122	6 Rev R M Costello Pl Boston MA 02122
		NC1-001-03-81/ 101 N TRYON ST	CHARLOTTE, NC	28255	740 Gallivan Blvd Boston MA 02122
		436 ASHMONT ST APT #1	DORCHESTER, MA	02122	10 Clover St 1 Boston MA 02122
		600 RPOVIDENCE HWY	DEDHAM, MA	02026	754 Gallivan Blvd Boston MA 02122
		200 ELM	DEDHAM, MA	02026	Gallivan Blvd Boston MA 02124
		30 Minot ST	DORCHESTER, MA	02122	30 Minot St Boston MA 02122
		10 REV R M COSTELLO PL	DORCHESTER, MA	02122	10 Rev R M Costello Pl Boston MA 02122
		12 MINOT ST	DORCHESTER, MA	02122	12 Minot St Boston MA 02122
		PO BOX 262	NORWOOD, MA	02062	770 Gallivan Blvd Boston MA 02122
		8 CLOVER ST	DORCHESTER, MA	02122	8 Clover St Boston MA 02122
		11 REV R M COSTELLO PL	DORCHESTER, MA	02122	11 Rev R M Costello Pl Boston MA 02122
		80 NEPONSET AVE	DORCHESTER, MA	02122	756 Gallivan Blvd Boston MA 02122
		GALLIVAN BL	DORCHESTER, MA	02124	Gallivan Blvd Boston MA 02124
		1375 WARWICK AVE	WARWICK, RI	02888	761 Gallivan Blvd Boston MA 02124
		26 Minot ST	DORCHESTER, MA	02122	26 Minot St Boston MA 02122
		398 NEPONSET AV	DORCHESTER, MA	02122	Neponset Av Boston MA 02122
		396 NEPONSET AV	DORCHESTER, MA	02125	4 Minot St Boston MA 02122
		600 RPOVIDENCE HWY	DEDHAM, MA	02026	Gallivan Blvd Boston MA 02122
		13 REV ROBERT M COSTELLO PL	DORCHESTER, MA	02122	13 Rev R M Costello Pl Boston MA 02122
		12 REV R M COSTELLO PL	DORCHESTER, MA	02122	12 Rev R M Costello Pl Boston MA 02122
		13 CLOVER ST	DORCHESTER, MA	02122	Clover St Boston MA 02122
					Boston MA
		2 MORRISSEY BLVD, MA1-MB4-02-02	DORCHESTER, MA	02125	790 Gallivan Blvd Boston MA 02122
		12 CLOVER ST #1	DORCHESTER, MA	02122	12 Clover St 1 Boston MA 02122
		56 CHICKATAWBUT ST	DORCHESTER, MA	02122	Dunns Te Boston MA 02122
		24 MINOT ST	DORCHESTER, MA	02122	24 Minot St Boston MA 02122
		10 Clover ST, Unit 2	DORCHESTER, MA	02122	10 Clover St 2 Boston MA 02122



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9402 6962 6000 0143 2201

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

Dorchester, MA 02125

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage	\$0.66
Total Postage and Fees	\$5.01

0493  
55  
Postmark  
Here

12/06/2023

Sent To  
9 Wave Ave #3  
Street and Apt. No., or PO Box No.  
Dorchester MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2362 2089

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

Dedham, MA 02026

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage	\$0.66
Total Postage and Fees	\$5.01

0493  
55  
Postmark  
Here

12/06/2023

Sent To  
600 Providence Hwy  
Street and Apt. No., or PO Box No.  
Dedham, MA 02026  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

9402 6962 6000 0143 2201

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

Dorchester, MA 02122

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage	\$0.66
Total Postage and Fees	\$5.01

0493  
55  
Postmark  
Here

12/06/2023

Sent To  
6 Rev R M Costello Pl  
Street and Apt. No., or PO Box No.  
Dorchester MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2362 2102

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

Dorchester, MA 02122

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage	\$0.66
Total Postage and Fees	\$5.01

0493  
55  
Postmark  
Here

12/06/2023

Sent To  
6 Rev R M Costello Pl  
Street and Apt. No., or PO Box No.  
Dorchester MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

9402 6962 6000 0143 2201

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

Norwood, MA 02062

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage	\$0.66
Total Postage and Fees	\$5.01

0493  
55  
Postmark  
Here

12/06/2023

Sent To  
PO Box 262  
Street and Apt. No., or PO Box No.  
Norwood MA 02062  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2362 2002

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)™.

Dorchester, MA 02122

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage	\$0.66
Total Postage and Fees	\$5.01

0493  
55  
Postmark  
Here

12/06/2023

Sent To  
12 Minot St  
Street and Apt. No., or PO Box No.  
Dorchester MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



7022 2410 0003 2369 1938

**U.S. Postal Service™  
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Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

**Norwood, MA 02062**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent to  
**PO Box 262**  
Street and Apt. No., or PO Box No.  
**Norwood MA 02062**  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 1754

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Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

**Dorchester, MA 02122**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent to  
**12 Clover St #2**  
Street and Apt. No., or PO Box No.  
**Boston, MA 02122**  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 2072

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Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

**Dorchester, MA 02122**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent to  
**436 Ashmont St #1**  
Street and Apt. No., or PO Box No.  
**Dorchester MA 02122**  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 2058

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**Dorchester, MA 02122**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent to  
**748 Gallivan Blvd**  
Street and Apt. No., or PO Box No.  
**Dorchester, MA 02122**  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 2065

**U.S. Postal Service™  
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Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

**Dorchester, MA 02122**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent to  
**740 Gallivan Blvd**  
Street and Apt. No., or PO Box No.  
**Dorchester MA 02122**  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 2041

**U.S. Postal Service™  
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**Dedham, MA 02026**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent to  
**200 Elm**  
Street and Apt. No., or PO Box No.  
**Dedham MA 02026**  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



7022 2410 0003 2369 1639

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

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Dorchester, MA 02122

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.66

Total Postage and Fees \$5.01

0493  
55  
Postmark  
Here  
12/06/2023

Sent To  
9 Rev. R M Costello Pl  
Street and Apt. No., or PO Box No.  
Boston, MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 1622

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

Dorchester, MA 02122

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.66

Total Postage and Fees \$5.01

0493  
55  
Postmark  
Here  
12/06/2023

Sent To  
5 Rev. R M Costello Pl  
Street and Apt. No., or PO Box No.  
Boston, MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 2034

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

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Dorchester, MA 02122

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.66

Total Postage and Fees \$5.01

0493  
55  
Postmark  
Here  
12/06/2023

Sent To  
10 Rev R M Costello Pl  
Street and Apt. No., or PO Box No.  
Dorchester MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 2027

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

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Dorchester, MA 02122

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.66

Total Postage and Fees \$5.01

0493  
55  
Postmark  
Here  
12/06/2023

Sent To  
30 Minot St  
Street and Apt. No., or PO Box No.  
Dorchester MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 1983

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

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Dorchester, MA 02122

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.66

Total Postage and Fees \$5.01

0493  
55  
Postmark  
Here  
12/06/2023

Sent To  
20 Minot St  
Street and Apt. No., or PO Box No.  
Dorchester, MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 1976

# U.S. Postal Service™ CERTIFIED MAIL® RECEIPT

Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

Dorchester, MA 02122

Certified Mail Fee	\$4.35
Extra Services & Fees (check box, add fee as appropriate)	\$0.00
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00
<input type="checkbox"/> Return Receipt (electronic)	\$0.00
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00
<input type="checkbox"/> Adult Signature Required	\$0.00
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00

Postage \$0.66

Total Postage and Fees \$5.01

0493  
55  
Postmark  
Here  
12/06/2023

Sent To  
16 Minot St  
Street and Apt. No., or PO Box No.  
Dorchester, MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



7022 2410 0003 2369 1952

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.  
Dorchester, MA 02122

**OFFICIAL USE**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent To  
7 Clover St  
Street and Apt. No., or PO Box No.  
Dorchester, MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 1945

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.  
Dorchester, MA 02122

**OFFICIAL USE**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent To  
12 Clover St # 3  
Street and Apt. No., or PO Box No.  
Dorchester MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 1921

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.  
Dorchester, MA 02122

**OFFICIAL USE**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent To  
60 Neponset Ave -  
Street and Apt. No., or PO Box No.  
Dorchester, MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 1761

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
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For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.  
Dorchester, MA 02122

**OFFICIAL USE**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent To  
7 Clover St  
Street and Apt. No., or PO Box No.  
Boston MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 1969

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
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For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.  
Dorchester, MA 02122

**OFFICIAL USE**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent To  
28 Minot St # 2  
Street and Apt. No., or PO Box No.  
Dorchester MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions

7022 2410 0003 2369 1776

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.  
Dorchester, MA 02122

**OFFICIAL USE**

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	12/06/2023
<b>Total Postage and Fees</b>	<b>\$5.01</b>	

Sent To  
10 Rev R M Costello Pl  
Street and Apt. No., or PO Box No.  
Boston, MA 02122  
City, State, ZIP+4®

PS Form 3800, April 2015 PSN 7530-02-000-9047 See Reverse for Instructions



7022 2410 0003 2369 1914

**U.S. Postal Service™  
CERTIFIED MAIL® RECEIPT**  
Domestic Mail Only

For delivery information, visit our website at [www.usps.com](http://www.usps.com)®.

Dorchester, MA 02122

Certified Mail Fee	\$4.35	0493 55
Extra Services & Fees (check box, add fee as appropriate)	\$0.00	
<input type="checkbox"/> Return Receipt (hardcopy)	\$0.00	Postmark Here
<input type="checkbox"/> Return Receipt (electronic)	\$0.00	
<input type="checkbox"/> Certified Mail Restricted Delivery	\$0.00	
<input type="checkbox"/> Adult Signature Required	\$0.00	
<input type="checkbox"/> Adult Signature Restricted Delivery	\$0.00	
Postage	\$0.66	
<b>Total Postage and Fees</b>	<b>\$5.01</b>	12/06/2023

Sent to  
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**[INTRODUCTION] JEFFERSON**

Good evening, for all attendees, please note that this meeting is being recorded.

Pursuant to Massachusetts Cannabis Control Commission regulation 935 CMR 500.000, applicants for marijuana establishment licenses must conduct a community meeting within 6 months of an application with notice to all abutters within 300 feet of the proposed project property line. However, due to the extended timelines associated with cannabis licensing and associated land use permitting, the previously held community meetings, sponsored by the Cedar Grove Neighborhood Association and the Mayor's Office of Neighborhood Services, were conducted outside of the required 6 month timeline. Therefore, tonight's meeting serves to insure the applicants compliance with CCC regulations as part of their application and while tonight's meeting does not inform an approval of this project, it continues the applicant's commitment to the community to provide timely updates, solicit feedback, and to be sure we answer any questions that you may have.

I'll now turn it over to the applicant, Surf's Up, and its management team, Richie Parsons and Michelle Foley, and at the end of the presentation we will make sure to take any questions.

**[OPENING SLIDE] RICHIE**

Good evening – and thank you.





I'm Richie Parsons, my family has lived in Adams Village in Dorchester since 1916 and I'm one of the Co-Founders and will be the General Manager of Surf's Up proposed at 770 Gallivan Boulevard.

**[NEXT SLIDE PLEASE - SLIDE 2]**

We are a highly experienced retail team committed to compliance and community.

I was a retail manager and district manager for Newbury Comics for 33 years and I am currently managing a successful medical marijuana dispensary in Needham – one, I might add, with a perfect compliance record.

**Michelle Foley** who joins me today is our Co-Founder and operations manager. Michelle has successfully run multiple high-end cannabis and high-end retail locations both in and around Boston and has also has an impeccable record for safety and compliance.

We recognize that communities want to work with people that have a proven track record, that have a deep knowledge in this space, and that have a hands-on approach.



We all believe in this work very deeply and we understand that it's the neighbors that look to us to develop an extremely professional facility that complements the community.

But we also recognize that being an experienced team is not enough.

You'll hear us repeat it a lot, but good companies don't exist without great relationships with communities. We want the neighborhoods we serve to understand that they have a reliable partner. Someone who listens, responds, and cares for the community.

So this is what we'd like to bring to the table: the integrity and experience of our team, as well as our commitment to the community as a responsible neighbor.

**[NEXT SLIDE PLEASE - SLIDE 3]**

Our team successfully managed 5 high-end cannabis retail facilities in Massachusetts, with locations in Boston, Cambridge, Needham, Watertown, and Somerville.

Michelle hired me in Needham 5 years ago and I am really proud of the dispensary's perfect, incident free track record, our relationship with Needham law enforcement and the community, as well as our setting and maintaining the gold standard of compliance with the CCC.



In fact, the CCC often used the Needham facility as training for newer inspectors as a model of a “tight ship.”

What you will hear over and over again is that stores under our management have really set the gold standard for cannabis operations in Massachusetts.

**[NEXT SLIDE PLEASE - SLIDE 4]**

A little about me and my connection to this neighborhood

- My family lived on Westmoreland Street from 1916 to 2016
- My dad worked at the Supreme market when he was 18 in 1936
- My dad ran the CCD program at St Brendan’s for 25 years
- My four brothers and I were all altar boys and me and my brother Moose sold newspapers outside the church on Sundays
- Most recently, my brother John just completed refurbishing the Statues on the altar at St Brendan’s
- My brother Bill has worked at Florian Hall for decades
- And as a teenager when I was working in Filene’s Basement, I wrote a song for my band called *No Surfin’ in Dorchester Bay* which became known throughout the neighborhood
- I sold the 45’s at Gerard’s (now Landmark) and Casali’s



I say all of this not to somehow impress you with local knowledge and lore – but because I want you to understand just how much I care about this community. My home.

Let's face it – for this little part of Boston, the idea of legal cannabis still sounds somehow foreign and is viewed with a certain level of stigma.

As a medical patient myself, I know that stigma first-hand.

But, I also know that me and my family's deep ties and relationships mean that even for those who may disagree with the product, they will never question my commitment to the community or that I will do what I think is right by them and the neighborhood.

**[SLIDE 6 PLEASE]**

We plan to positively impact the community in a real and meaningful way, as you can see with our dedicated \$110,000 per year for 5 years in Community Benefits,

**[SLIDE 7 PLEASE]**

We have done the work and the outreach. I have spent every weekend for months getting out into the community, meeting people, knocking on doors, and responding to people's questions and concerns.



With that, we have received support from the Cedar Grove Civic Association with a vote of 61% in favor of the project, a letter of support from District Councilor Frank Baker, and more than 60 residents and neighbors throughout the neighborhood, including one of the site's direct abutters.

**[SLIDE 9 PLEASE]**

Some highlights on 770 Gallivan:

- The site is an existing, high-volume commercially zoned retail store that previously hosted a busy Verizon store and a regional COVID-19 testing site
- And as you can see here, the site is located adjacent to Neponset Circle with ample access to multimodal public transit options

**[NEXT SLIDE PLEASE – Slide 10]**

- The site is home to what would represent the largest availability of dedicated parking for any cannabis establishment in Boston
- The site directly abuts another commercial retail tenant, AutoZone
- The site has significant buffering to the surrounding residential area which cannot be directly accessed off Gallivan Boulevard due to the one-way egress from Clover Street
- This means there is no potential for the site to generate vehicular traffic in the residential neighborhood



**[SLIDE 14 PLEASE]**

This proposal meets all siting requirements, except for presence of an existing non-retail, delivery-only marijuana facility at 1170 Morrissey Boulevard or approximately 3/10<sup>th</sup> a mile away as you would walk or drive

This is important as the general public—regardless of age—is prohibited from entering or otherwise accessing a delivery-only facility

Its also noteworthy that ZypRun was approved for delivery-only and pledged here to you on December 8, 2021 that it would never pursue a retail license

Finally, 1170 Morrissey is separated from 770 Gallivan by four lanes of high-speed traffic, metal barriers, the I-93 overpass, and the Neponset Circle.

**[SLIDE 16 PLEASE.... Michelle....]**

Thank you, Richie....

Surf's Up is dedicated to supporting, creating, and developing programs and partnerships by and for Bostonians to ensure Surf's Up's workforce reflects the demographics of the City of Boston:



1. Building careers with opportunities for economic mobility by embracing living wages, generous benefits, flexible work hours, and diversity through targeted and intentional outreach;
2. Providing mentorship and meaningful economic opportunities for Boston-based EE and social equity entrepreneurs;
3. Engaging in innovative outreach tools through partnerships with legal services, faith-based organizations, and law enforcement; and,
4. Incorporating diversity and inclusion values throughout all level

**[SLIDE 19 PLEASE]**

We've created a *Boston First* program to give local hiring preference to Boston residents with a goal of 75% of our store employees coming from the City, with particular focus on hiring from the Dorchester neighborhood. We plan to hire 65% people of color, 50% women, and hope to welcome and employ individuals with CORIs or who have a parent or spouse with a criminal record.

**[SLIDE 22 PLEASE]**

It bears repeating that under our management, our stores have had zero incidents for theft, diversion, or public nuisance.



And we will institute a strict, zero tolerance policy.

- No use of products on the premise or in the directly surrounding neighborhood;
- No nuisances;
- Security has sole discretion to refuse access;
- And any person violating these regulations or disrespecting our community will be *permanently banned* from the facility.

Surf's Up will prominently display educational materials and signage to remind customers that diversion to minors is illegal.

And leveraging proven, best in class tobacco prevention policies, no single pre-rolls will be sold, and Surf's Up's policy will be a minimum purchase of 3 pre-rolls.

**[SLIDE 25 PLEASE]**

*(RICHEL)*

In closing, thank you for the privilege to be before you today. This is personal. We take this seriously. And if you give us a chance, we won't let you or my Dorchester community down. Thank you and we will now take your questions.

We'll just give it a couple minutes to make sure we address any concerns if someone joins late.





**IF NO QUESTIONS OR WHEN FINISHED:**

Seeing no questions, I want to thank everyone for being a part of this Community Meeting and we are excited to have the opportunity to serve this neighborhood. Happy Holidays.



*Surf's Up*

• CANNABIS CO. •

**770 GALLIVAN BOULEVARD**  
**DORCHESTER, MA 02122**

Community Meeting  
*December 18, 2023*

# Experienced Team Focused on Community



**Richard Parsons**

*Co-Founder  
Retail Manager*

**Cannabis Dispensary  
Expert**



**Michelle Foley**

*Co-Founder  
Operations Manager*

**High End Multi-Site  
Cannabis Retail Expert**

## EXPERIENCE & INTEGRITY

Hands-on management team who believe in the work we do and in the opportunities it creates for our employees and neighbors.

## COMMITMENT TO COMMUNITY

Good companies don't exist without great relationships with communities. We are dedicated to creating a cooperative relationship with Dorchester and setting the example of what it means to be a good neighbor.

# Commitment to Community Starts with Integrity

## Our Team's Track Record

### Successfully Managed Five (5) High-End Cannabis Retail Locations

- Boston
- Somerville
- Cambridge
- Watertown
- Needham

### Successful Compliance Record

- Zero Incidents for Break-ins or Theft
- Zero Incidents for Diversion
- Zero Incidents for Public Nuisance

### Record of Unparalleled Safety

- Cannabis Control Commission Inspectors Train at Our Facilities
- Helped Establish Gold Standard for Cannabis Industry

# Dorchester is Home

## Our History

Born and Raised in Cedar Grove

- 100 Year Family History in Dorchester
- St. Brendan's Parish

## Our Name

- ***No Surfin' in Dorchester Bay***
- Honor the Neighborhood while
- Creating a Safe Environment for a New Economic Opportunity





# Surf's Up Application Timeline

**June 1, 2022** – Surf's Up Filed ISD Appeal #ALT1341252

**August 16, 2022** – Presentation to Cedar Grove Civic Association

**August 17, 2022** – ISD Refusal Letter (0.5 Mile Buffer Conflict)

**August 18 - October 24, 2022**

- Voluntarily negotiated and agreed to community benefits package (\$110,000/year for 5 years from commence operations)
- Conducted additional community outreach, including but not limited to:
  - District Councilor Frank Baker
  - Councilor At-Large Erin Murphy
  - State Representative Dan Hunt
  - Pope's Hill Neighborhood Association

**October 25, 2022** – Cedar Grove Civic Association Support - 61% in favor and 39% opposed

**November 4, 2022** – BCB application submitted

**January 18, 2023** – ONS Community Outreach meeting held

**February 8, 2023** – Letter of support received from District Councilor Baker

**February 22, 2023** – Letter of support from direct abutter, Mr. Steven Collette of 20 Minot Street

**February - March 2023** – Collection of 50+ Resident Statements of Support

**April 2023** – Boston Cannabis Board Approval Received

**July 2023** – Boston Zoning Board of Appeals Approval Received



# Community First

## **\$110,000/year for 5 years in Community Benefits**

- Community Benefits Program could be distributed by a local community foundation comprised only of community residents and groups
- Eligibility for funding will be determined solely by the community foundation
- Community benefits distribution to begin within 6 to 12 months after doors open

Example investments:

Dorchester Youth Hockey	Gaelic Football
Dorchester Little League	St. Brendan School
Dorchester Lacrosse	Leahy-Holloran Community Center

## **Dorchester First**

- Committed to hiring local residents first (~30 expected positions created)
- Competitive wages with excellent benefits

Living Wages	Health Care Options
401k	Paid Time Off
Sick Leave	AD&D and Basic Life

# Strong Community Support

## Letters of Support:

- **Cedar Grove Civic Association**  
General Membership voted in support by a vote of 61% in favor and 39% opposed
- District City Councilor **Frank Baker**
- **Direct abutter** Mr. Steven Collette  
of 20 Minot Street, Dorchester
- **Collection of 50+ Resident Statements of Support**





*Location*



# Commercial District – Existing High-Volume Retail Site – Dedicated Parking

## Existing High-Volume Commercial Use

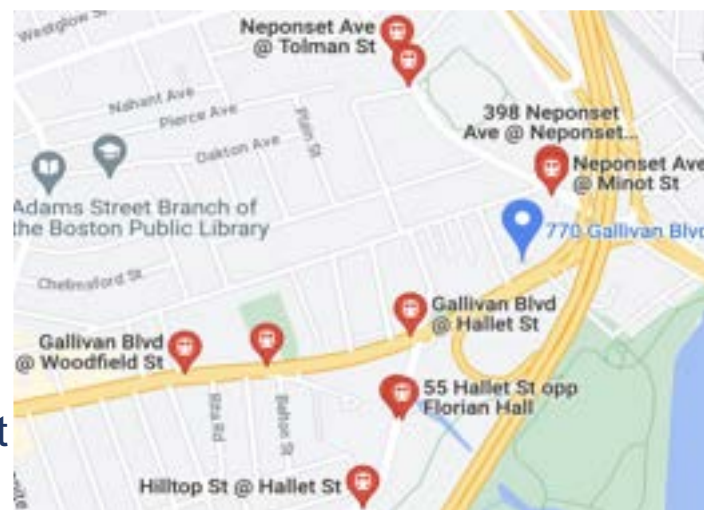
- Site is located within commercial Dorchester Neighborhood Shopping (“NS”) zoning district
- Previously hosted a high-volume Verizon retail store, as well as a busy regional COVID-19 testing site

## Significant Dedicated Parking

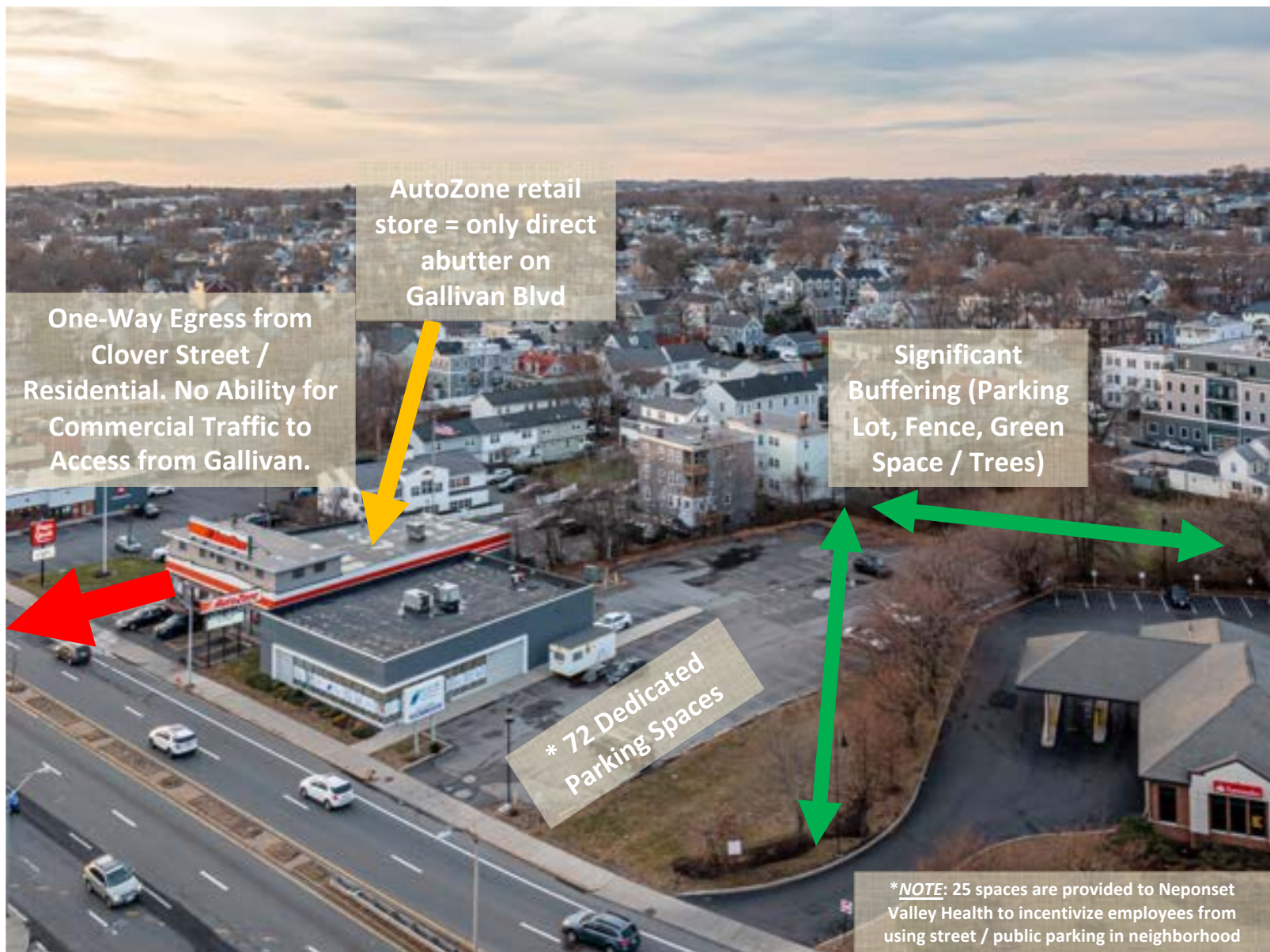
- Would represent the largest availability of dedicated parking for any cannabis establishment in the City
- 72 existing, dedicated parking spaces

## Ample Access to Public Transit Modalities

- Located at Neponset Circle with access to ample public transit
- 1 mile from the Cedar Grove MBTA Station
- Two #201 MBTA bus stops (Gallivan Blvd@Hallet Street and Neponset Ave@Minot Street)
- Two #210 MBTA bus stops (Neponset Ave@Minot Street and 398 Neponset Ave@Neponset Health Center)
- #202 MBTA bus stop (Neponset Ave@Minot Street)



# 770 Gallivan Boulevard – Site View



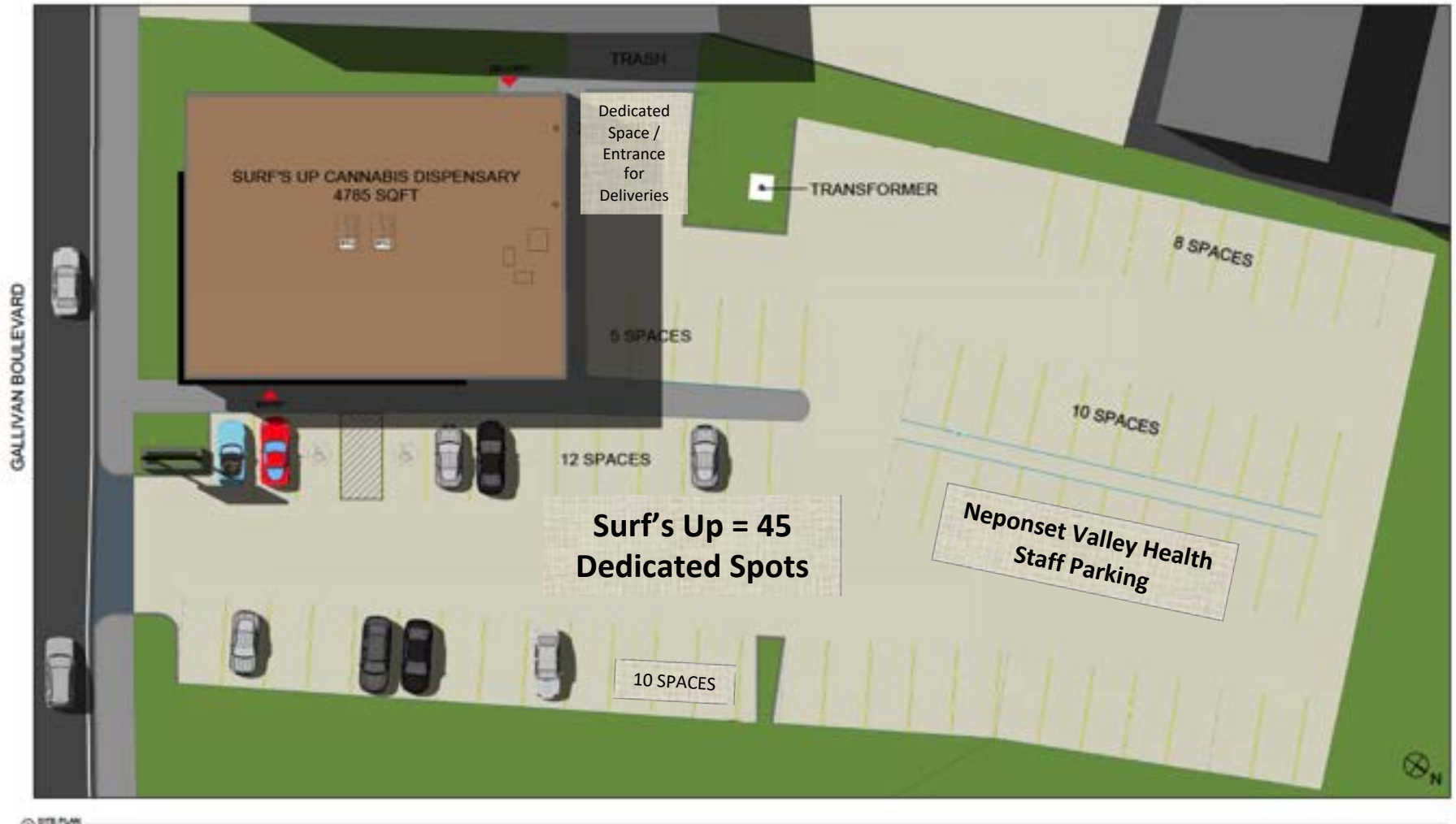


# 770 Gallivan Boulevard – Proposed Site View



VIEW FROM GALLIVAN BOULEVARD

# 770 Gallivan Boulevard – Site Layout





# 770 Gallivan Boulevard – Proposed Retail Layout

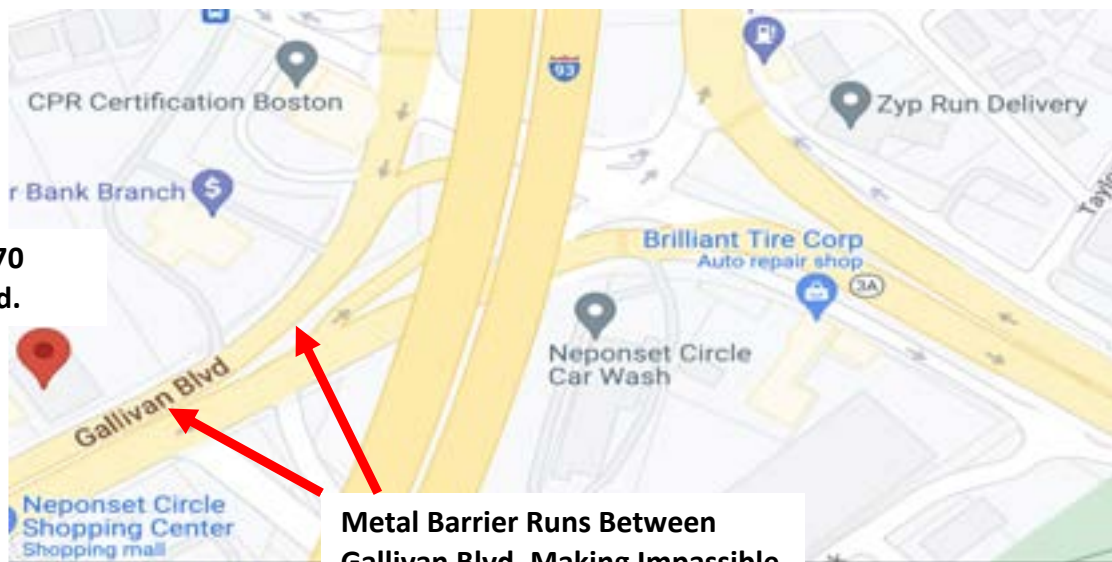


# Delivery-Only Buffer Conflict – Significant Artificial Barriers

## 0.5 Mile Buffer Conflict w/ Delivery-Only Licensee

- Project meets all siting requirements, except for presence of existing non-retail, delivery-only marijuana facility (1170 Morrissey Blvd), located 0.3 miles away as would walk or drive
- General public—regardless of age—is **prohibited** from entering or otherwise accessing delivery-only facility
- ZypRun was approved for delivery-only and pledged, in writing, on December 8, 2021 to the BCB that it would never pursue a retail license in the community
- The express purpose of the City Council when instituting the ½ mile buffer requirement = to prevent the creation of a “Green Mile” or areas of high-density cannabis retail facilities
- 1170 Morrissey Blvd is **separated from 770 Gallivan Boulevard by four lanes of high-speed traffic, metal barriers, the I-93 overpass, and the Neponset Circle roundabout**

Surf's Up, 770  
Gallivan Blvd.



Metal Barrier Runs Between  
Gallivan Blvd, Making Impossible



*Diversity & Inclusion*

# Empowering the Community

**Surf's Up is dedicated to supporting, creating, and developing programs and partnerships by and for Bostonians** to ensure Surf's Up's workforce reflects the demographics of the City of Boston for minorities, women, veterans, persons with disabilities, immigrant populations, and people of all gender identities and sexual orientations by promoting the following goals:

- 1. Building careers with opportunities for economic mobility** by embracing living wages, generous benefits, flexible work hours, and diversity through targeted and intentional outreach;
- 2. Providing mentorship and meaningful economic opportunities** for Boston-based economic empowerment and social equity entrepreneurs;
- 3. Engaging in innovative outreach tools through partnerships** with legal services, faith-based organizations, and law enforcement organizations; and,
- 4. Incorporating diversity and inclusion values throughout all levels**, with particular focus on minorities and women for hiring, promotion and retention, both internally and externally through vendors.



# Empowering the Community

## Community Engagement

- Engaging community members where they are by holding community meetings to provide access to information about the cannabis industry to address the history and stigma for those skeptical of the industry
- Presenting historical and contextual information to build careers in cannabis
- Holding informational seminars in all areas of disproportionate impact

## Workforce Development

- Engaging in innovative outreach tools through partnerships with legal service agencies, faith-based organizations, and law enforcement organizations (e.g. Suffolk DA and Sheriff's Offices)
- Engaging in targeted workforce development/training including through partnerships with "jail-to-jobs" Operation Exit and The CultivatED Program
- Expanded outreach for job postings and contracts for services
- Incorporating diversity and inclusion values throughout all levels with a particular focus on minorities and women, promoting and retaining both internally and through our vendor, professional, and contracted services relationships

## Empowering Entrepreneurs

- Focusing on partnerships with local, diverse entrepreneurs to develop locally-inspired and co-owned marijuana and merchandise brands
- Requiring all management employees to commit at least 5% of their time to mentoring minority-owned cannabis businesses
- Mentoring will focus on developing business plans, applying for licenses, fundraising and entrepreneurial risks/rewards strategy



# *Employment Plan*

# Employment for Boston by Boston

## Dorchester and Boston First!

- Committed to hiring local residents first (~30 expected positions created)
- Our goal is to hire 75% of store employees from the City of Boston, instituting a neighborhood and City hiring preference



## Putting People First

- Career development opportunities for promotion and compensation growth
- Committed to providing work/life balance according to individual needs
- Accrual of vacation and sick time on the first day of employment and paid holidays, regardless of full- or part-time status
- Competitive wages with excellent benefits

Living Wages

401k

Sick Leave

Health Care Options

Paid Time Off

AD&D and Basic Life

# Employment *for Boston by Boston*

## Being Intentional

- Goal is to seek a workforce comprised of at least 65% minorities and 50% women
- Seeking partnerships with programs like City of Boston Workforce Development, City of Boston Office of Economic Development, Operation Exit, and The CultivatED Program
- Surf's Up will provide training to all staff and will not require any prior cannabis industry experience as a condition of employment



MASS CultivatED

## Responding to the Failed War on Drugs

- Goal to seek a workforce comprised of at least 20% individuals with criminal records or who have a parent or spouse with a criminal record
- Seeking partnerships with organizations like The CultivatED Program, Honest Jobs, Aid to Incarcerated Mothers, Operation Exit, Suffolk County Sheriff's Department's Reentry Initiative, and the Last Prisoner Project to identify employees through participation in job fairs, as well as supporting and hosting pro bono legal aid clinics





*Safety & Security*

# Safety & Security

## Experienced Security & Operations Team

- Operations and retail management team have proven track record of strict compliance – a record that has resulted in CCC on-site trainings
  - Zero incidents for Break-ins or Theft
  - Zero incidents for Diversion
  - Zero incidents for Public Nuisance

## High-End Retailer

- Retail experience, products and price points appeal directly to high-end market
- High-end consumers constitute the overwhelming majority of customers and foot traffic
  - 65+, Young Professionals, Veterans
  - Cannabis consumers are by definition self-selecting and law-abiding

## Strict Zero Tolerance Policy

- No use on premises; Strictly enforced
- Security has sole discretion to refuse access
- Any person violating these regulations are permanently banned from the facility

# Safety & Security

## Product Security

- All cannabis products will be placed in a securely monitored and locked storage vault with limited access, and monitored by 24/7 redundant security cameras and alarms
- Access to storage areas will be restricted to only specific employees
- Multiple inventory counts performed throughout daily operations
- Seed-to-sale inventory software to track the location and weight of all cannabis products

## Diversion Prevention

- Customers enter through secure vestibule; strictly limited by security to 21+ with trained security associates utilizing IDscience Scanners to ensure strict compliance
- Employees educate guests on safe storage of cannabis and reinforce the dangers of distribution to and use by minors
- All packaging will be tamper-proof, child-resistant, and labeled pursuant to 935 CMR 500.105(6)
- Selling Only Inseparable Packs of at Least Three (3) Pre-Rolls

# Safety & Security

## Safe Delivery of Products

- All vehicles have GPS tracking and are closely monitored throughout the transport route
- All routes and arrival times are randomized and all vehicles have two security personnel in the vehicle. Upon arrival, security remains with the vehicle while delivery is completed
- Site has dedicated and secure delivery access area at rear of building, ensuring that all deliveries do not interfere with retail operations during business hours

## Secure Cash Management

- Partnership with experienced cash management security vendor through Northern Bank & Trust Co. for secure transportation of deposits
- All plainclothes officers will use unmarked vehicles and utilize randomized routes during store hours





***Thank you!***

**Q & A**

## **Plan for Positive Impact**

Cannabis prohibition has disproportionately impacted certain communities in Massachusetts. As the Commonwealth begins to embrace the adult-use cannabis industry in earnest, Surf's Up Cannabis Ventures, LLC ("SU") recognizes that it has a responsibility to contribute to areas of disproportionate impact and help disproportionately harmed by marijuana prohibition. SU will focus its time and resources in Boston

### **PURPOSE**

Surf's Up Cannabis Ventures, LLC's ("SU") Plan for Positive Impact was developed recognizing our obligation to provide positive community impacts and benefits to those people and communities disproportionately burdened by the War on Drugs. Our plan is focused on community outreach and equity initiatives and metrics that address those disproportionately (and historically) harmed by marijuana prohibition in Boston. SU will focus its time and resources on the following census tracts and locations more fully identified below.

### **I. INITIATIVES AND METRICS – Areas of Disproportionate Impact**

Through the following initiatives, SU seeks to assist communities within Boston that have been designated disproportionately impacted by the Commission and consistent with 935 CMR500.105(4) which provides the permitted and prohibited advertising, branding, marketing, and sponsorship practices of Marijuana Establishments. More specifically, SU has and will continue to work closely with its City of Boston District Councilor to identify and engage organizations within neighboring census tracts representing Areas of Disproportionate Impact within the City of Boston. While 770 Gallivan Boulevard does not represent one of these tracts, many neighboring tracts do and ensuring targeted and sustained outreach to these communities will be the primary focus of SU.

**Program 1: Community Engagement meetings and events** – Working in partnership with 770 Gallivan's District Councilor, SU will participate in or host a series of community outreach meetings conducted in neighboring Boston Areas of Disproportionate Impact census tracts. SU intends to target well-known and culturally accessible community spaces where members of the public are already comfortable - Hibernian Hall (184 Dudley Roxbury, MA 02119, census tract 804.01) and Haley House Bakery and Café (12 Dade Street, Roxbury, MA 02119, census tract 804.01). SU will face "head on" the complicated social, political, and economic history of cannabis in the United States with humility and responsibility. Critically, this is an opportunity to connect with community members with general information about the basics of cannabis retail in Boston, allowing for individuals to envision this industry as a career and explore the many

opportunities for careers at SU. We will be focused on discussing the economic and social impact of cannabis retail, as well as how people in disproportionately impacted areas can enter into the cannabis retail space. Operating in community spaces that people regularly frequent and are seen as “safe and inclusive zones” are critical to reducing barriers to entry in the adult-use cannabis industry. We will provide support and open discussions around joining the cannabis space, and how to utilize community resources to succeed.

**Goal:** Reduce barriers to entry in the commercial adult-use cannabis industry for disproportionately harmed people so those living in disproportionately impacted communities see themselves in – and feel welcomed by – the MA cannabis industry generally and SU specifically with a goal of holding 3 community engagement meetings prior to opening and reaching 250 residents per year.

**Metrics:** CL will track the number of engagement meetings held each year and the number residents who participate in these community engagement meetings. We expect to reach 250 residents per year within the Tier 1 and 2 Boston Census tracts identified. We will begin holding community engagement meetings 3 months prior to opening and hold one meeting per quarter, thereafter. The total number of residents reached in 2024 will depend on the store opening date.

**Program 2: Informational Training Seminars** – The requirement of “previous cannabis experience” is an unintended barrier to employment in cannabis. Those who enjoyed unfettered access to employment in the medical cannabis industry can now amplify this disproportionate advantage by moving to the top of the recruiting hierarchy in the recreational market. SU will conduct informational training seminars in partnership with its District Councilor, our strong partnership with CultivatED, and other cannabis companies (especially economic empowerment and social equity businesses) to take advantage of similarly scaled operations. We intend to collaborate with these businesses to host job fairs at Roxbury Community College that will provide attendees with accessible job opportunities, one-on-one informational interviews, and development of career plans. These will be posted in a newspaper of general circulation, as well as flyers in Roxbury Community College.

**Goal:** Provide mentoring, professional and technical services for disproportionately harmed individuals in a manner that an applicant is not blindly accepting a position without a full understanding of the job and opportunities that can flow from the knowledge base acquired and skills developed. We will target at least 5 individuals for one-on-one mentoring, targeting those with prior drug convictions. We will focus on job opportunities and criminal record sealing to ensure better success with hiring.

**Metric:** SU will participate in one job fair in 2024, 2-3 months prior to SU’s opening and measure the number of people in attendance. SU will also track the number of job fairs and employment outreaches targeting disproportionately harmed individuals held each year.

**Program 3: CultivatED** - SU will make an annual financial contribution of \$5,000 to the CultivatED program to help promote participation in the cannabis industry by those who were disproportionately harmed by marijuana prohibition. CultivatED is a training cannabis program

that provides access to the cannabis industry for returning citizens. CultivatED empowers, educates, and employs MA residents who have past drug convictions, their parents or spouse who have past drug convictions. The program shall provide to its fellows: Responsible Vendor Training, as well as an "Introduction to Cannabis and the Law" course at Roxbury Community College, while receiving workforce development training through CultivatED's cannabis company partners. In collaboration with CultivatED, CL will host or join quarterly expungement clinics to assist in the administrative expungement and sealing of CORIs. In order to ensure donations, in any form, are going directly to organizations serving or helping areas of disproportionate impact, SU will highlight that donations and procurement dollars will be received through CultivatED, with the condition that the organization does serve the aforementioned areas.

**Goal:** Reducing barriers to entry and providing legal benefits in the commercial adult-use cannabis industry to disproportionately harm people with a goal of participating in four (4) CORI clinics and reaching at least 100 people with 20 records expunged.

**Metrics:** SU will keep track of the number of CORI clinics it participates in, the number of people it works with, and the number of records expunged per year. We hope to participate in four CORI clinics, reaching a total of 100 participants with 20 records successfully expunged in 2024.

## **CONCLUSION**

SU will conduct continuous and regular evaluations of the implementation of its goals and at any point will retool its policies and procedures in order to better accomplish the goals set out in this Plan for Positive Impact. Any actions taken, or programs instituted by SU will not violate the Commission's regulations with respect to limitations on ownership or control or other applicable state laws. Progress and/or success of this plan will be documented one year from provisional licensure and each year thereafter. SU will also adhere to any and all requirements set forth in 935 CMR 500, including 935 CMR 500.105(4), which provides the permitted and prohibited advertising, branding, marketing and sponsorship practices of Marijuana Establishments.





**The Commonwealth of Massachusetts**  
**William Francis Galvin**

Minimum Fee: \$500.00

Secretary of the Commonwealth, Corporations Division  
 One Ashburton Place, 17th floor  
 Boston, MA 02108-1512  
 Telephone: (617) 727-9640

**Certificate of Organization**

(General Laws, Chapter )

Identification Number: 001616768

1. The exact name of the limited liability company is: SURF'S UP CANNABIS VENTURES LLC

2a. Location of its principal office:

No. and Street: 770 GALLIVAN BOULEVARD  
 City or Town: DORCHESTER State: MA Zip: 02122 Country: USA

2b. Street address of the office in the Commonwealth at which the records will be maintained:

No. and Street: 770 GALLIVAN BOULEVARD  
 City or Town: BOSTON State: MA Zip: 02122 Country: USA

3. The general character of business, and if the limited liability company is organized to render professional service, the service to be rendered:

APPLYING FOR A LICENSE WITH THE CANNABIS CONTROL COMMISSION.

4. The latest date of dissolution, if specified:

5. Name and address of the Resident Agent:

Name: MICHELLE FOLEY  
 No. and Street: 47 RALPH TALBOT STREET  
 City or Town: SOUTH WEYMOUTH State: MA Zip: 02190 Country: USA

I, MICHELLE FOLEY resident agent of the above limited liability company, consent to my appointment as the resident agent of the above limited liability company pursuant to G. L. Chapter 156C Section 12.

6. The name and business address of each manager, if any:

Title	Individual Name First, Middle, Last, Suffix	Address (no PO Box) Address, City or Town, State, Zip Code
MANAGER	WILLIAM KARGER	9015 GRAYSON CIRCLE MOUNT JULIET, TN 37122 USA
MANAGER	RICHARD PARSONS	371 BELMONT STREET QUINCY, MA 02170 USA
MANAGER	CHRISTINE ARGIOS	P.O. BOX 262 NORWOOD, MA 02062 USA

7. The name and business address of the person(s) in addition to the manager(s), authorized to execute documents to be filed with the Corporations Division, and at least one person shall be named if there are no managers.

Title	Individual Name First, Middle, Last, Suffix	Address (no PO Box) Address, City or Town, State, Zip Code
SOC SIGNATORY	MICHELLE FOLEY	47 RALPH TALBOT STREET SOUTH WEYMOUTH, MA 02190 USA

**8. The name and business address of the person(s) authorized to execute, acknowledge, deliver and record any recordable instrument purporting to affect an interest in real property:**

Title	Individual Name First, Middle, Last, Suffix	Address (no PO Box) Address, City or Town, State, Zip Code
REAL PROPERTY	RICHARD PARSONS	371 BELMONT STREET QUINCY, MA 02170 USA
REAL PROPERTY	WILLIAM KARGER	9015 GRAYSON CIRCLE MOUNT JULIET, TN 37122 USA

**9. Additional matters:**

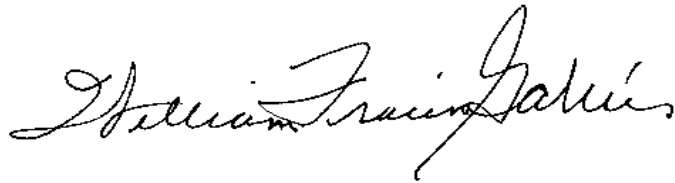
**SIGNED UNDER THE PENALTIES OF PERJURY, this 4 Day of November, 2022,  
MICHELLE FOLEY**

*(The certificate must be signed by the person forming the LLC.)*

THE COMMONWEALTH OF MASSACHUSETTS

I hereby certify that, upon examination of this document, duly submitted to me, it appears that the provisions of the General Laws relative to corporations have been complied with, and I hereby approve said articles; and the filing fee having been paid, said articles are deemed to have been filed with me on:

November 04, 2022 07:57 AM

A handwritten signature in black ink, reading "William Francis Galvin". The signature is written in a cursive style with a large, prominent initial "W".

WILLIAM FRANCIS GALVIN

*Secretary of the Commonwealth*



**The Commonwealth of Massachusetts**  
**William Francis Galvin**

Minimum Fee: \$100.00

Secretary of the Commonwealth, Corporations Division  
 One Ashburton Place, 17th floor  
 Boston, MA 02108-1512  
 Telephone: (617) 727-9640

**Certificate of Amendment**

(General Laws, Chapter )

Identification Number: 001616768

The date of filing of the original certificate of organization: 11/4/2022

1.a. Exact name of the limited liability company: SURF'S UP CANNABIS VENTURES LLC

1.b. The exact name of the limited liability company as amended, is: SURF'S UP CANNABIS VENTURES LLC

2a. Location of its principal office:

No. and Street: 770 GALLIVAN BOULEVARD  
 City or Town: DORCHESTER State: MA Zip: 02122 Country: USA

3. As amended, the general character of business, and if the limited liability company is organized to render professional service, the service to be rendered:

4. The latest date of dissolution, if specified:

5. Name and address of the Resident Agent:

Name: MICHELLE FOLEY  
 No. and Street: 47 RALPH TALBOT STREET  
 City or Town: SOUTH WEYMOUTH State: MA Zip: 02190 Country: USA

6. The name and business address of each manager, if any:

Title	Individual Name First, Middle, Last, Suffix	Address (no PO Box) Address, City or Town, State, Zip Code
MANAGER	RICHARD PARSONS	371 BELMONT STREET QUINCY, MA 02170 USA
MANAGER	CHRISTINE ARGIOS	P.O. BOX 262 NORWOOD, MA 02062 USA

7. The name and business address of the person(s) in addition to the manager(s), authorized to execute documents to be filed with the Corporations Division, and at least one person shall be named if there are no managers.

Title	Individual Name First, Middle, Last, Suffix	Address (no PO Box) Address, City or Town, State, Zip Code
SOC SIGNATORY	MICHELLE FOLEY	47 RALPH TALBOT STREET SOUTH WEYMOUTH, MA 02190 USA



**8. The name and business address of the person(s) authorized to execute, acknowledge, deliver and record any recordable instrument purporting to affect an interest in real property:**

<b>Title</b>	<b>Individual Name</b> First, Middle, Last, Suffix	<b>Address</b> (no PO Box) Address, City or Town, State, Zip Code
REAL PROPERTY	RICHARD PARSONS	371 BELMONT STREET QUINCY, MA 02170 USA

**9. Additional matters:**

**10. State the amendments to the certificate:**

REMOVAL OF WILLIAM KARGER AS MANAGER AND PERSON AUTHORIZED TO EXECUTE, ACKNOWLEDGE, DELIVER AND RECORD ANY RECORDABLE INSTRUMENT PURPORTING TO AFFECT AN INTEREST IN REAL PROPERTY.

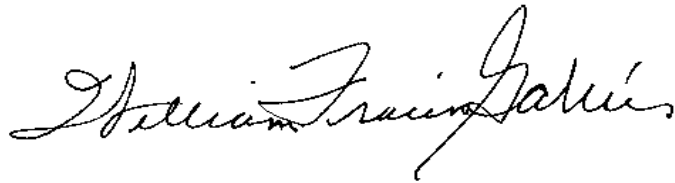
**11. The amendment certificate shall be effective when filed unless a later effective date is specified:**

**SIGNED UNDER THE PENALTIES OF PERJURY, this 10 Day of November, 2022,  
RICHARD PARSONS , Signature of Authorized Signatory.**

THE COMMONWEALTH OF MASSACHUSETTS

I hereby certify that, upon examination of this document, duly submitted to me, it appears that the provisions of the General Laws relative to corporations have been complied with, and I hereby approve said articles; and the filing fee having been paid, said articles are deemed to have been filed with me on:

November 10, 2022 12:01 PM

A handwritten signature in black ink, reading "William Francis Galvin". The signature is written in a cursive style with a large, prominent initial "W".

WILLIAM FRANCIS GALVIN

*Secretary of the Commonwealth*



## CERTIFICATE OF GOOD STANDING AND/OR TAX COMPLIANCE



RANDY KASTON  
SURF'S UP CANNABIS VENTURES LLC  
1188 CENTRE ST  
NEWTON MA 02459-1556

### ***Why did I receive this notice?***

The Commissioner of Revenue certifies that, as of the date of this certificate, SURF'S UP CANNABIS VENTURES LLC is in compliance with its tax obligations under Chapter 62C of the Massachusetts General Laws.

This certificate doesn't certify that the taxpayer is compliant in taxes such as unemployment insurance administered by agencies other than the Department of Revenue, or taxes under any other provisions of law.

**This is not a waiver of lien issued under Chapter 62C, section 52 of the Massachusetts General Laws.**

### ***What if I have questions?***

If you have questions, call us at (617) 887-6400 or toll-free in Massachusetts at (800) 392-6089, Monday through Friday, 9:00 a.m. to 4:00 p.m..

### ***Visit us online!***

Visit [mass.gov/dor](http://mass.gov/dor) to learn more about Massachusetts tax laws and DOR policies and procedures, including your Taxpayer Bill of Rights, and MassTaxConnect for easy access to your account:

- Review or update your account
- Contact us using e-message
- Sign up for e-billing to save paper
- Make payments or set up autopay

Edward W. Coyle, Jr., Chief  
Collections Bureau

Use the confirmation code below to print another copy of this letter or to review your submission.



**Commonwealth of Massachusetts**  
Department of Revenue  
Geoffrey E. Snyder, Commissioner

mass.gov/dor

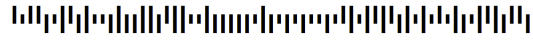
Letter ID: L0019692320  
Notice Date: October 24, 2023  
Case ID: 0-002-205-882



## CERTIFICATE OF GOOD STANDING AND/OR TAX COMPLIANCE

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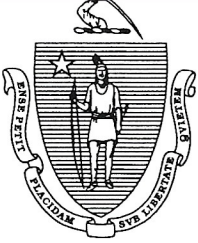
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RANDY KASTON  
SURF'S UP CANNABIS VENTURES LLC  
1188 CENTRE ST  
NEWTON MA 02459-1556

Confirmation Code: 2ssjxt





*The Commonwealth of Massachusetts*  
*Secretary of the Commonwealth*  
*State House, Boston, Massachusetts 02133*

William Francis Galvin  
Secretary of the  
Commonwealth

October 25, 2023

TO WHOM IT MAY CONCERN:

I hereby certify that a certificate of organization of a Limited Liability Company was filed in this office by

**SURF'S UP CANNABIS VENTURES LLC**

in accordance with the provisions of Massachusetts General Laws Chapter 156C on **November 4, 2022.**

I further certify that said Limited Liability Company has filed all annual reports due and paid all fees with respect to such reports; that said Limited Liability Company has not filed a certificate of cancellation; that there are no proceedings presently pending under the Massachusetts General Laws Chapter 156C, § 70 for said Limited Liability Company's dissolution; and that said Limited Liability Company is in good standing with this office.

I also certify that the names of all managers listed in the most recent filing are:  
**RICHARD PARSONS, CHRISTINE ARGIROS**

I further certify, the names of all persons authorized to execute documents filed with this office and listed in the most recent filing are: **RICHARD PARSONS, CHRISTINE ARGIROS, MICHELLE FOLEY**

The names of all persons authorized to act with respect to real property listed in the most recent filing are: **RICHARD PARSONS**

In testimony of which,

I have hereunto affixed the

Great Seal of the Commonwealth

on the date first above written.

A handwritten signature in cursive script that reads "William Francis Galvin".

Secretary of the Commonwealth



**EXECUTION VERSION**

**SURF'S UP CANNABIS OPERATIONS, LLC**  
**AMENDED AND RESTATED OPERATING AGREEMENT**  
**DATED AS OF OCTOBER 15, 2023**

THE COMPANY INTERESTS REPRESENTED BY THIS LIMITED LIABILITY COMPANY AGREEMENT HAVE NOT BEEN REGISTERED UNDER THE UNITED STATES SECURITIES ACT OF 1933, AS AMENDED, OR UNDER ANY OTHER APPLICABLE SECURITIES LAWS. SUCH INTERESTS MAY NOT BE SOLD, ASSIGNED, PLEDGED OR OTHERWISE DISPOSED OF AT ANY TIME WITHOUT EFFECTIVE REGISTRATION UNDER SUCH ACT AND LAWS OR EXEMPTION THEREFROM AND COMPLIANCE WITH THE OTHER SUBSTANTIAL RESTRICTIONS ON TRANSFERABILITY SET FORTH HEREIN.

THE COMPANY INTERESTS REPRESENTED BY THIS LIMITED LIABILITY COMPANY AGREEMENT ARE ALSO SUBJECT TO ADDITIONAL RESTRICTIONS ON TRANSFER AND REPURCHASE OPTIONS SET FORTH IN THIS AGREEMENT.

THIS AMENDED AND RESTATED OPERATING AGREEMENT ("Agreement") of Surf's Up Cannabis Operations, LLC, a Massachusetts limited liability company (the "Company"), is made as of October 15, 2023 (the Effective Date) by and among the persons named on Schedule 1 hereto as the Members of the Company. The parties hereto, intending to be legally bound, agree as follows:

## **ARTICLE 1 ORGANIZATIONAL MATTERS**

### **Section 1.1 Formation of Limited Liability Company**

The Company became a limited liability company under the laws of the Commonwealth of Massachusetts and pursuant to the Act on November 4, 2022, by the filing of a Certificate of Organization (the "Certificate") with the Secretary of State of the Commonwealth of Massachusetts, as required by the Act.

### **1.2 Name**

The name of the Company shall be Surf's Up Cannabis Operations, LLC, provided that the Management Committee (defined below) may select and utilize various trade names from time to time. The Management Committee may change the name of the Company, subject to the terms of this Agreement and applicable law.

### **1.3 Offices**

The registered office of the Company in the Commonwealth of Massachusetts is the office named in the Certificate or such other office (which need not be a place of business of the Company) as the Management Committee may designate. The registered agent of the Company in the Commonwealth of Massachusetts is the person named in the Certificate or such other Person or Persons as the Management Committee may subsequently designate in the manner provided by law. The principal office of the Company is 770 Gallivan Boulevard, Boston, MA 02122, or at such other place as the Management Committee may designate, which need not be in the Commonwealth of Massachusetts.

### **1.4 Purpose**

The purpose of the Company is to own and operate, as a licensed entity, directly or indirectly through a Subsidiary and/or joint ventures, one or more businesses (each a "Location", and together the "Locations") and to engage in the sale of products within the cannabis industry, to perform any other purposes approved by the Management Committee, and to exercise all of the rights and the performance of all of the obligations that relate to such activities, and to engage in such other activities directly related to the foregoing business as may be necessary, advisable or appropriate in the discretion of the Management Committee (collectively, the "Business").

### **1.5 Fiscal Year**

The fiscal year of the Company shall be the calendar year or such other fiscal year as the Management Committee shall determine.

### **1.6 Term**

The Company was formed on the date of filing of the Certificate and its period of existence shall be perpetual until termination and dissolution thereof in accordance with the provisions of Article 9 of this Agreement.

### **1.7 Capitalized Terms**

Capitalized terms used but not defined herein shall have the meanings ascribed to them in Section 10.1 of this Agreement.

## **ARTICLE 2 CAPITAL CONTRIBUTIONS AND CAPITAL ACCOUNTS**

### **2.1 Initial Capital Contributions; Units**

The membership interests of the Members shall be represented by issued and outstanding Units, which shall be classified as Class A or Class B. No type, class or series of Units shall be certificated unless otherwise determined by the Management Committee. The total number of Units which the Company is authorized to issue and the authorized capital of the Company shall be designated by the Management Committee as either shares of Class A or Class B Units. Each Member listed on Schedule 1 has made, or contemporaneously with the execution of this Agreement will make, a capital contribution to the Company in the amount set forth on Schedule 1 and is deemed to own the Units set forth opposite such Member's name on Schedule 1.

### **2.2 No Additional Capital Contribution**

The Members shall not be required to make any additional capital contributions.

### **2.3 Capital Accounts**

Separate and individual Capital Accounts shall be established and maintained by the Company for each Member in accordance with the rules of Treasury Regulation Section 1.704-1(b)(2)(iv). The Capital Account of each Member shall be credited with the Member's capital contributions (at fair market value with respect to contributed property, net of any liabilities assumed by the Company in connection with such contribution or to which such contributed property is subject) and shall be appropriately adjusted to reflect each Member's allocations of Net Profits and Net Losses, the fair market value of property distributed (net of any liabilities assumed by such Member or any liabilities to which such property is subject) to the Member and such other adjustments as shall be required by Code Section 704 and the Treasury Regulations promulgated thereunder.

## **2.4 Limited Liability**

No Manager or Member shall be personally liable to satisfy any judgment, decree, or order of a court for, or be personally liable to satisfy in any other manner, any debt, obligation, or liability (whether arising in contract, tort or otherwise) of the Company solely by reason of being a Manager or Member.

## **2.5 No Interest on or Right to Withdraw Capital Contributions; Negative Capital Accounts**

No interest shall be paid by the Company and no Member shall have the right to receive interest on capital contributions or on the balance in any capital account and no Member shall have the right to withdraw the Member's capital contribution or to demand or receive a return of the Member's capital contribution or to otherwise withdraw as a Member. No Member shall be required to pay to any other Member or the Company any deficit or negative balance that may exist from time to time in such Member's Capital Account (including upon and after dissolution of the Company).

## **2.6 Additional Units**

Subject to Section 4.1(b), no Member shall have the right to make additional capital contributions to the Company without the consent of a majority vote of the members of the Management Committee. Subject to Section 4.1(b), subsequent to the initial issuance of Units, additional Units may be authorized, issued and sold by the Company to any Person, whether or not already a Member, in such number, amount and upon such terms and conditions as are determined by a majority vote of the Members of the Company, based upon their respective percentage ownership interests in the Company (the "Additional Units"); provided however, that no Additional Units shall be issued and sold unless such Additional Units shall have first been offered to the Members pursuant to Section 2.7 below. Any Person purchasing Additional Units shall become a Member of the Company for all purposes upon signing a counterpart to this Agreement.

## **2.7 Pre-Emptive Rights.**

(a) Subject to the exclusion provided for in subsection (d) and Section 4.1(b) below, before the Company may issue and sell Additional Units to any Person (including an existing Member, but excluding any issuances which are made on a pro rata basis to all Members) (the "Proposed Purchaser") the Company must first make a bona fide offer (the "Offer") to sell such Additional Units to all of the existing Members in accordance with this Section 2.7. The Company shall provide written notice to each Member, which shall set forth (i) the identity of the Proposed Purchaser, (ii) the total number of Additional Units subject to the Offer and such Member's pro rata portion thereof, (iii) the purchase price thereof, which must be stated in United States dollars (the "Offer Price"), and (iv) all other terms of the Offer, including the closing date, which shall not be earlier than twenty (20) days or later than one hundred twenty (120) days after the date notice of the Offer (the "Notice Date") is given by the Company to the Members (collectively items (i) through (iv), the "Offer Terms"); provided, however, that any of the foregoing requirements may be waived with the written consent of all Members. Each Member shall have fifteen (15) business



days ("Preemptive Period") to elect to purchase all or a portion of such Member's pro rata portion as set forth in the Offer, by providing written notice to the Company (e-mail being sufficient) of such election. The Offer Terms, including the Offer Price, made to the Members pursuant to this Section 2.7 shall be no less favorable (and in the case of the Offer Price, no greater) than the terms on which such Additional Units are to be sold to the Proposed Purchaser. For purposes of this Section 2.7, a Member's "pro rata portion" shall be the product of the total Additional Units being offered in connection with an Offer multiplied by a fraction (i) the numerator of which is the number of Units such Member owns as of the Notice Date and (ii) the denominator is the aggregate number of Units owned by all the Members as of the Notice Date.

(b) If any Member does not exercise such Member's option to purchase all or a part of its pro rata portion of the Additional Units pursuant to Section 2.7(a) (such remainder, the "Remaining Additional Units"), then within five (5) days of the expiration of the Preemptive Period, the Company shall notify any Member that has elected to purchase all of its pro rata portion pursuant to Section 2.7(a) of the opportunity to purchase all or a portion of such Remaining Additional Units. Such Member shall have fifteen (15) days to elect to purchase all such Remaining Additional Units. If more than one Member is eligible to purchase Remaining Additional Units pursuant to this Section 2.7(b), such Members shall be entitled to purchase their ratable portion of such Remaining Additional Units, determined based on the ratio of Units held by such Member relative to the Units held by all such eligible Members.

(c) If any Member does not exercise such Member's option to purchase any Additional Units or Remaining Additional Units pursuant to Section 2.7(a) or 2.7(b) (or if any such Member fails to pay the Offer Price in the time frame set forth for payment in the Offer notice), the Company may sell any such unpurchased Additional Units to the Proposed Purchaser; provided, that such sale shall occur not later than one hundred eighty (180) days after the Notice Date and only in accordance with the Offer Terms (except with regard to the sale price which may exceed the Offer Price). In the event a sale contemplated by the preceding sentence is not consummated within one hundred eighty (180) days, any sale beyond such time shall again be subject to this Section 2.7.

(d) This section shall not apply to any Units reserved for an equity incentive plan approved under this Agreement, or otherwise issued to employees, consultants, advisors and the like for purposes of compensation.

## **2.8 Investment Representations and Acknowledgments**

Each of the Members represents and acknowledges to the Company as of the date hereof (or, with regard to any later-admitted Member, as of the date such Member executes a counterpart signature or joinder to this Agreement), with respect to the issuance of Units to such Member, as follows:

(a) The Units are being purchased for the Member's own account and for investment and not with a view to or for resale in connection with any distribution or public offering of the Units within the meaning of the Securities Act of 1933, applicable state securities laws, and other applicable securities laws and rules (collectively the "Securities Laws").

(b) The Member has such knowledge and experience in financial and business matters that the Member is capable of evaluating the merits and risks of the purchase of the Units.

(c) All documents, records, and books pertaining to the Company and the purchase of the Units have been made and are available to the Member and representatives of the Member, and the Member has had an opportunity to ask questions of and receive answers from all persons related to the Company concerning the Company and the Units.

(d) The Units have not been registered under any of the Securities Laws and cannot be resold or otherwise disposed of and must be held indefinitely unless they are subsequently registered under the Securities Laws or an exemption from registration is available.

(e) The exemption under Rule 144 under the Securities Act of 1933 may not be available for the resale of the Units.

(f) The Company is under no obligation and does not intend to register the Units under the Securities Laws or to effect compliance with any exemption from registration under the Securities Laws in the future.

(g) The Member has not been subject to any criminal, civil, administrative, or other legal proceeding in any domestic or foreign jurisdiction that would disqualify the Member from owning Units in the Company, and the Member has complied in all respects with any provisions otherwise limiting ownership or control of a marijuana business under Chapter 935 of the Code of Massachusetts Regulations.

## **2.9 Drag-Along**

(a) Subject to Section 4.1(b), in the event that the sale of the Company (whether by merger, reorganization, consolidation sale of all or substantially all of the Company's assets or sale, directly or indirectly, of all of the outstanding Units) to an unaffiliated third-party is approved by the consent of a majority of the Members of the Company, based upon their respective percentage ownership interests in the Company (an "Approved Sale"), each and every one of the other Members (each, a "Drag-Along Member") agrees to sell in such Approved Sale all Units held by such Drag-Along Member for the same form and amount of consideration per class of Unit and otherwise on the same terms and conditions upon which all other Members sell their Units.

(b) Each Member hereby waives, to the extent permitted by applicable law, all rights to object to or dissent from such Approved Sale and hereby agrees to consent to and raise no objections against such Approved Sale. The Company and the Members hereby agree to cooperate fully in any Approved Sale and not to take any action prejudicial to or inconsistent with such Approved Sale.

(c) At least thirty (30) days prior to the anticipated closing date of an Approved Sale, the Company shall provide a written notice (the "Drag-Along Notice") of the Approved Sale to the Drag-Along Members. The Drag-Along Notice must set forth the consideration per Unit (per Unit class, if applicable) to be paid in such Approved Sale and the other terms and conditions of the

Approved Sale and include copies of the documents to be executed by such Drag-Along Members (collectively, "Ancillary Documents"), which may include, but not be limited to, transfer agreements, sale agreements, escrow agreements, consents, assignments, releases and waivers. Not later than 15 days after receipt of the Drag-Along Notice, each of the Drag-Along Members shall deliver to the Management Committee an unconditional agreement in writing to sell all of such Drag-Along Member's right, title and interest in such Drag-Along Member's Units pursuant to this Section 2.9 simultaneously with the consummation of such Approved Sale in exchange for delivery to such Drag-Along Member of the consideration therefor and all Ancillary Documents required to be executed in connection with such Approved Sale (the release of which may be conditioned upon consummation of the Approved Sale). Each Member will be obligated to (i) pay its respective pro rata share of the expenses incurred by the Members in connection with any such Approved Sale to the extent not paid or reimbursed by the Company or unaffiliated third-party purchaser; provided, that no Member shall be obligated to make any out-of-pocket expenditure prior to the consummation of the Approved Sale, and (ii) shall be responsible for such Member's pro rata share in any purchase price adjustments, indemnification or other obligations that the sellers of Units, other equity interests or assets are required to provide in connection with such sale so that proceeds will be distributed as if they had been distributed after giving effect to such adjustments, indemnification and other obligations (other than any such obligations that relate specifically to a particular Member, such as indemnification with respect to representations and warranties given by a Member individually regarding such Member's title to and ownership of Units); provided, that all representations, warranties, covenants and indemnities shall be made by the Members severally and not jointly and no Member will be obligated in connection with an Approved Sale to agree to indemnify or hold harmless the transferees with respect to an amount in excess of the net cash proceeds paid to such Member in connection with such Approved Sale. In connection with any Approved Sale, each Member appoints the members of the Management Committee or its designee as its representative to make all decisions in connection with any sale agreement (including the right to resolve any potential indemnification claims or other disputes on behalf of all Members). In the event that any Member receives a Drag-Along Notice pursuant to this Section 2.9(c), such Member agrees to use its commercially reasonable efforts, to take, or cause to be taken, all action and to do, or cause to be done, all things necessary, proper or advisable, under applicable laws and regulations (including, without limitation, to ensure that all appropriate legal and other requirements are met and all consents of third parties are obtained), to consummate the proposed transactions contemplated by this Section 2.9. If any such vote is required by applicable law, each Member agrees that, in addition to any of the requirements of the immediately preceding sentence, such Member shall vote all of its Units in favor of the transaction. The Members hereby appoint the members of the Management Committee or its designee as its attorney in fact to enter into any agreements to effectuate this Section 2.9(c). If the closing of the Approved Sale does not occur within 90 days following the date of the Drag-Along Notice, on the terms set forth therein, the Company and the Members may not then effect a transaction subject to this Section 2.9 without again fully complying with the provisions of this this Section 2.9(c).

## **ARTICLE 3**

### **CASH FLOW PAYMENTS; ALLOCATIONS AND DISTRIBUTIONS**

#### **3.1 Allocation of Net Profits and Net Losses**

Except as otherwise required by law, Net Profits and Net Losses shall be allocated in proportion to the Members' respective ownership of Units. The intent of the foregoing allocation is to comply with Treasury Regulations Section 1.704-1(b) and to ensure that the Members receive allocations of Net Profits and Net Losses pursuant to this Section 3.1 in accordance with their relative economic interests in the Company.

#### **3.2 Special Allocations**

Notwithstanding Section 3.1, appropriate adjustments shall be made to the allocations to the extent required to comply with the "qualified income offset," "minimum gain chargeback," "partner nonrecourse debt minimum gain chargeback," "nonrecourse deductions" and "partner nonrecourse deductions" rules of the Treasury Regulations promulgated pursuant to Code Section 704(c). To the extent permitted by such Treasury Regulations, the allocations in such year and subsequent years shall be further adjusted so that the cumulative effect of all of the allocations shall be the same as if all such allocations were made pursuant to the allocation provisions hereof without regard to this section.

#### **3.3 Tax Allocations**

The income, gains, losses, credits, and deductions recognized by the Company shall be allocated among the Members, for U.S. federal, state, and local income tax purposes, to the extent permitted under the Code and the Treasury Regulations, in the same manner that each such item is allocated to the Members' Capital Accounts, except as provided in Sections 3.3(a) and (b).

(a) If property is contributed to the Company by a Member, and there is a difference between the basis of such property to the Company for U.S. federal income tax purposes and the Gross Asset Value at the time of its contribution, then items of income, gain, deduction and loss with respect to such property, as computed for U.S. federal income tax purposes (but not for book purposes), shall be allocated (in any permitted manner determined by the Management Committee) among the Members so as to take account of such book/tax difference as required by Code Section 704(c).

(b) If property (other than property described in Section 3.3(b)) of the Company is reflected in the Capital Accounts of the Members and on the books of the Company at a Gross Asset Value that differs from the adjusted basis of such property for U.S. federal income tax purposes by reason of a revaluation of such property, then items of income, gain, deduction and loss with respect to such property, as computed for U.S. federal income tax purposes (but not for book purposes), shall be allocated among the Members in a manner that takes account of the difference between the adjusted basis of such property for U.S. federal income tax purposes and its Gross Asset Value in the same manner as differences between the adjusted basis and fair market value are taken into account in determining the Members' share of tax items under Code Section 704(c).

### **3.4 Distributions from Operations**

(a) Except for Tax Distributions under Section 3.5, distributions to Members from the Company shall be made from Cash Flow according to an agreed upon schedule determined by unanimous consent of the Managers.

(b) For purposes of this section, neither a reimbursement to a Manager or a Member for an expenditure properly considered as a cost or expense of the Company, nor the payment by the Company of any fee to a Manager or Member, nor the payment to a Manager or Member of any principal or interest on any loan, shall be considered a distribution to a Member.

(c) All distributions, upon dissolution or otherwise, shall be made solely from the Property and no Member (even if the Member has a deficit balance in the Member's capital account) or Manager shall be personally liable for any such return. Any securities or other assets distributed to the Members shall be valued at their fair market value as determined in good faith by the Management Committee.

(d) Notwithstanding any other provision contained in this Agreement, the Company shall not make a distribution to a Member if such distribution would violate the Act or other applicable law.

(e) Subject to Section 4.1(b), there shall be no in-kind distributions without the consent of a majority of the members of the Management Committee.

### **3.5 Tax Distributions**

(a) The Management Committee may, in their sole discretion, if such funds are available, cause the Company to distribute to each Member, within ninety (90) days after the end of its fiscal year, an amount of cash at least sufficient to reimburse the Members for any income taxes payable in respect of his or its distributive share of the Company's income during the preceding fiscal year (such distributions, "Required Minimum Tax Distributions"). The Company accountant shall determine a single income tax rate (state and federal) which shall be applied for the purposes of this paragraph to all Members, regardless of their individual tax rate.

(b) Any distribution made pursuant to Section 3.5(a) which exceeds the amount of the Required Minimum Tax Distribution for any tax year shall not affect the determination of the Required Minimum Tax Distribution for any subsequent tax year. Notwithstanding anything to the contrary in this Section 3.5, the Company shall be under no obligation to make any Required Minimum Tax Distribution if such distribution (i) is then prohibited under applicable law, (ii) is then prohibited under any agreement to which the Company is a party or (iii) would materially impair the Company's ability to conduct its affairs or the Business.

### **3.6 Distributions Other Than From Operations**

All cash from a Capital Transaction shall be distributed to the Members according to the order and priority set forth in Section 3.4 above.



**ARTICLE 4.**  
**MANAGEMENT: RIGHTS, POWERS AND OBLIGATIONS OF A MANAGER**

**4.1 Management and Control in General.**

(a) Powers of Managers. The business of the Company shall be exercised by or under the direction of the Management Committee, acting as a majority of the members of the Management Committee, and the Members shall have no right (unless otherwise granted by the Management Committee) to act on behalf of or bind the Company. The Management Committee will have full, exclusive and complete discretion to manage and control the business and affairs of the Company, to make all decisions affecting the business and affairs of the Company, and to take all such actions as it reasonably deems necessary or appropriate to accomplish the purposes of the Company as set forth herein. Each of the Managers shall have all the rights, powers and obligations of a manager as provided in the Act and as otherwise provided by law, provided, that a Manager shall only have the right to exercise such authority upon (i), if applicable, receipt of the required approval set forth in Section 4.1(b) below, and (ii) having been so authorized by the Management Committee. Once authorized pursuant to the immediately preceding sentence, any Manager may act to bind the Company and to sign contracts on behalf of the Company.

**4.2 Number and Appointment of Managers; Removal**

(a) The Company shall have three (3) Managers (the "Management Committee"), who will be appointed as set forth below.

- (i) Class A Unitholders shall appoint, voting as a class, two (3) members of the Management Committee. The initial Managers on behalf of the Class A Unitholders shall be Christine Argrios, Michelle Foley and Richard Parsons;

Each class of Unitholders as delineated above shall be solely and exclusively responsible to elect the Manager(s) representing their class. Such voting in each class shall be determined solely on the basis of percentage ownership of Units, and without regard to the number of Unitholders.

(b) Subject to Section 4.1(b), all decisions of the Management Committee shall require the affirmative vote of a majority of the Managers. The Managers shall discuss and negotiate in good faith to reach consensus on all decisions, including the use of non-binding mediation.

(c) Any Manager of the Company may resign at any time by giving written notice to the Members of the Company. The resignation of any Manager will take effect upon receipt of notice thereof or at such later time as will be specified in such notice; and, unless otherwise specified therein, the acceptance of such resignation will not be necessary to make it effective. Subject to Article 6, the resignation of a Manager who is also a Member will not affect the Manager's rights as a Member.

(d) Notwithstanding Section 4.2(a), a Manager may be removed at any time for any reason by a majority of the number of Unitholders, without regard to percentage ownership of Units. A Manager may also be removed for "cause" by the Consent of the Members. For purposes of this section, "cause" shall mean (i) a conviction or a plea of no contest to any federal or state crime, excluding routine motor vehicle charges not involving the use of alcohol or drugs by the Manager; (ii) fraud, negligence or intentional misconduct with respect to the Company; or (iii) repeated or

continued willful failure to perform his agreed-upon duties to the Company. Subject to Article 6, the removal of a Manager who is also designated by a Member will not constitute a withdrawal of a Member.

(e) Any vacancy occurring for any reason in the number of Managers of the Company will be filled by the appointment of new Managers by the Person(s) entitled to appoint Managers for such vacant seats as described in Section 4.2(a) within thirty (30) days of the occurrence of the vacancy. If a replacement Manager is not appointed within this period, the Management Committee acting unanimously may fill the vacant seat (such a Manager appointed by the Management Committee, a "Temp Manager"); provided, that (i) the Members entitled to appoint a Manager to fill the seat held by a Temp Manager may at any time upon fifteen (15) days' notice to the Management Committee appoint a Manager to replace such Temp Manager and (ii) upon delivery to the Management Committee of such notice the Temp Manager shall automatically be deemed to have resigned as a Manager.

(f) A Manager shall not be required to be a Member, a resident of Massachusetts, or a natural person.

(g) Except as otherwise provided herein, no Member will take part in the day-to-day management, or the operation or control, of the business and affairs of the Company, except upon the approval of the Management Committee. Except and only to the extent expressly provided for in this Agreement or as delegated by the Manager, no Person other than the Officers (defined below) will be an agent of the Company or have any right, power or authority to transact any business in the name of the Company or to act for or on behalf of or to bind the Company.

### **4.3 Employment of Others, Including Affiliates**

Subject to Section 4.1(b), the Management Committee shall have the right to appoint officers and agents of the Company and establish their compensation and duties. Nothing contained in this Agreement shall preclude the employment by the Company of any Manager or Member or any agent or third party to operate and manage all or any portion of the Company or its businesses or to provide any service relating to the business of the Company, subject to the control of the Management Committee. Subject to Section 4.1(b), the Company (or any Subsidiary thereof) may engage Affiliates of any Manager or Member to render services to the Company; provided that any such engagement shall be upon terms and conditions no less favorable to the Company than could be obtained from an independent third party. Neither the Company nor any of the Members shall have, as a consequence of the relationship created hereby, any right in or to any income or profits derived by a Manager or Member or an Affiliate of any of the Manager or Members from any business arrangements with the Company which are consistent with this Section.

### **4.4 Costs and Expenses; Manager Compensation**

The Company shall pay all costs and expenses arising from or relating to the organization of the Company, the development of the Business and the commencement and continuation of Company operations. No Manager shall be entitled to compensation for its role as Manager unless approved by the Consent of the Members.

### **4.5 Title to Property**

Title to Property shall be taken in the name of the Company.

#### **4.6 Liability of Managers**

No Manager or any Affiliate of a Manager, or their respective officers, shareholders, controlling persons, directors, agents and employees, shall be liable, responsible or accountable in damages or otherwise to the Company or to any of the Members, their successors or permitted assigns, for any act or failure to act in connection with the affairs of the Company, unless it is proved, by clear and convincing evidence, in a final, non-appealable decision of a court of competent jurisdiction that its act or failure to act was undertaken with deliberate intent to cause injury to the Company or undertaken with reckless disregard for the best interests of the Company. Any action taken in good faith in reliance upon and in accordance with the advice or opinion of counsel shall be conclusively deemed not to constitute an undertaking with deliberate intent to cause injury to, or with reckless disregard for the best interests of, the Company.

#### **4.7 Indemnification**

The Company shall, to the fullest extent permitted by law, indemnify or agree to indemnify any Person who was or is a party or is threatened to be made a party to any threatened, pending or completed action, suit or proceeding, whether civil, criminal, administrative or investigative, and whether or not such Person is acting by or in the right of the Company, by reason of the fact that such Person is or was a Manager, officer, employee or agent of the Company or any Manager, or is or was serving at the request of the Company as a manager, director, trustee, officer, employee or agent of another limited liability company, corporation, partnership, joint venture, trust, or other enterprise or employee benefit plan, against expenses (including attorney fees), judgments, penalties, fines and amounts paid in settlement incurred in connection with any such action, suit or proceeding; provided that such indemnification shall not be available if the acts or omissions giving rise to such costs shall be determined by a court of competent jurisdiction to have been performed or omitted in willful misconduct, gross negligence or fraud.

#### **4.8 Insurance**

The Company may purchase and maintain directors and officers insurance, to the extent and in such amounts as the Management Committee deems reasonable, on behalf of the Management Committee, Officers and such other Persons as the Management Committee will determine, against any liability that may be asserted against or expenses that may be incurred by any such Person in connection with the activities of the Company or such indemnities, regardless of whether the Company would have the power to indemnify such Person against such liability under the provisions of this Agreement. In addition, the Company and any Subsidiary may obtain key person life insurance on such individuals and in such amounts as may be approved by the Consent of the Members from time to time.

#### **4.9 Fiduciary Duties of Members**

Except as may be expressly provided for herein, this Agreement is not intended to, and does not, create or impose any fiduciary duty on any Member. To the greatest extent permitted by law (including under the Act), each Member hereby waives any and all fiduciary duties owed by any other Members in its capacity as a Member that, absent such waiver, may be implied by law or equity, and in doing so, recognize, acknowledge and agree that the Members' duties and obligations to one another and to the Company are only as expressly set forth in this Agreement, any other express agreements to which they are a party. Managers all have such fiduciary duties to the Members as required by law.

#### **4.10 Devotion of Time**

A Manager is not obligated to devote all of their time or business efforts to the affairs of the Company but shall devote whatever time, effort and skill is reasonably necessary for the profitable operation of the Company and the proper performance of the Manager's duties.

### **ARTICLE 5. MEETINGS; VOTING AND OFFICERS**

#### **5.1 Meetings of Members.**

(a) Notice of Meetings. Meetings of Members may be called by (i) the Management Committee or (ii) the Members holding at least fifteen percent (15%) of the outstanding Units held by all Members that are entitled to vote at such meeting. Unless otherwise waived by the Members, written notice of any meeting, stating the time, place and purpose of the meeting, shall be given either by personal delivery or email 48 hours in advance.

(b) Quorum. Presence in person of Members owning a majority of the then outstanding Units of the class entitled to vote at such meeting shall constitute a quorum. Such Members may adjourn such meeting from time to time. Notice of adjournment of a meeting need not be given if the time and place to which it is adjourned are fixed and announced at such meeting. At the adjourned meeting the Company may transact any business which might have been transacted at the original meeting.

(c) Actions. The affirmative vote of Members owning a majority of the Units of the class entitled to vote at such meeting who are present at a duly constituted meeting shall, unless a greater vote is required by the Act, this Agreement or the Certificate, be the duly adopted act of the class of Members entitled to vote.

(d) Action by Members Without Meeting. Any action required or permitted to be taken at a meeting of the Members may be taken without a meeting if a consent in writing, setting forth the actions so taken, shall be signed by the Members holding not less than the minimum number of Units that would be necessary to authorize or take such action at a meeting at which all of the Members were present and voting. Prompt notice of the taking of the action without a meeting by less than a unanimous consent shall be given to all Members.

(e) Telephonic Meetings. The Members may participate in and act at any meeting of the Members through the use of a conference telephone or other communications equipment by means of which all persons participating in the meeting can hear each other. Participation in such meeting shall constitute attendance and presence in person at the meeting of the Persons so participating.

(f) Proxies. Any Person who is entitled to attend or vote at a meeting or to execute consents, waivers, or releases may be represented or vote at such meeting, execute consents, waivers, and releases, and exercise any of its other rights by proxy or proxies appointed by a writing signed by such person or its duly appointed attorney-in-fact.

(g) Place of Meeting. All meetings of Members shall be held at the place stated in the notice of meeting, which may be within or without the Commonwealth of Massachusetts.

(h) Waiver of Notice. When any notice is required to be given to any Member, a waiver thereof in writing executed by the Member, whether before, at or after the time stated therein, shall be equivalent to the giving of such notice. The attendance of any Member at any such meeting

without protesting, prior to or at the commencement of the meeting, the lack of proper notice shall be deemed to be a waiver by such Member of notice of such meeting.

(i) Electronic Transmissions. An electronic transmission, including but not limited to an email, consenting to an action to be taken and transmitted by a Member or proxy holder, or by a person or persons authorized to act for a Member or proxy holder, shall be deemed to be written, signed and dated for the purposes of this Section 5.1, provided that any such electronic transmission sets forth, or is delivered with information from which the Company can determine, (i) that the electronic transmission was transmitted by the Member or proxy holder or by a person or persons authorized to act for the Member or proxy holder, and (ii) the date on which such Member or proxy holder or authorized person or persons transmitted such electronic transmission. The date on which the electronic transmission is transmitted shall be considered to be the date on which it was signed.

## 5.2 Meetings of Managers

(a) Notice of Meetings. Meetings of the Management Committee may be called by any Manager. Written notice of any meeting, stating the time and place of the meeting, shall be given either by personal delivery or by mail not less than two (2) days nor more than thirty (30) days before the date of the meeting to each Manager. If mailed, such notice shall be sent to the Managers in accordance with Section 10.2.

(b) Quorum; Actions. A majority of the members of the Management Committee shall be required for a quorum for transaction of business at any meeting of the Management Committee. The Management Committee may only act upon the approvals set forth in Section 4.2(b).

(c) Action by Managers Without Meeting. Any action required or permitted to be taken at a meeting of the Management Committee may be taken without a meeting if a consent in writing, setting forth the actions so taken, shall be signed by all of the Managers.

(d) Telephonic Meetings. The Managers may participate in and act at any meeting of the Managers through the use of a conference telephone or other communications equipment by means of which all persons participating in the meeting can hear each other. Participation in such meeting shall constitute attendance and presence in person at the meeting of the Persons so participating.

(e) Place of Meeting. All meetings of Managers shall be held at the place stated in the notice of meeting, which may be within or without the Commonwealth of Massachusetts.

(f) Waiver of Notice. When any notice is required to be given to any Manager, a waiver thereof in writing executed by the Manager, whether before, at or after the time stated therein, shall be equivalent to the giving of such notice. The attendance of any Manager at any such meeting without protesting, prior to or at the commencement of the meeting, the lack of proper notice shall be deemed to be a waiver by such Manager of notice of such meeting.

(g) Electronic Transmissions. An electronic transmission, including but not limited to an email, consenting to an action to be taken and transmitted by a Manager shall be deemed to be written, signed and dated for the purposes of this Section 5.2, provided that any such electronic transmission sets forth, or is delivered with information from which the Company can determine, (i) that the electronic transmission was transmitted by the Manager, and (ii) the date on which such Manager transmitted such electronic transmission. The date on which the electronic transmission is transmitted shall be considered to be the date on which it was signed.



### **5.3 Record Date and Closing Unit Transfer Books**

(a) Record Date. For any lawful purpose, including without limitation the determination of the Members who are entitled to receive notice of or to vote at any meeting of Members or to receive payment of any distribution, the Management Committee may fix a record date which shall not be a date earlier than the date on which the record date is fixed and shall not be more than sixty (60) days preceding the date of the meeting of Members or the date fixed for the payment of the distribution, as the case may be. When a determination of Members entitled to vote at any meeting of Members has been made as provided herein, such determination shall apply to any adjournment thereof.

(b) Closing Unit Transfer Books. The Management Committee may close the Company's Unit Journal (as defined below) against transfers of Units during the whole or any part of the period between the record date and the date fixed for the payment of any distribution.

(c) Adjournments. When a determination of Members entitled to vote at any meeting of Members has been made as provided in this Section, such determination shall apply to any adjournment thereof.

### **5.4 Officers**

The Management Committee shall have the authority to appoint, oversee and remove officers of the Company from time to time. One individual may hold two or more offices. The officers of the Company shall be chosen by the Management Committee and, unless otherwise determined by the Management Committee, may include a President, Vice- President, Treasurer and a Secretary with such powers and duties as are customary to such officers and such additional powers and duties as the Management Committee may from time to time designate (hereinafter "Officers"). The compensation of all Officers of the Company shall be fixed by the Management Committee, unless that function shall have been delegated otherwise. The Officers of the Company shall hold office until such time as they die, resign or their successors are chosen and qualify in their stead. If the office of any Officer or Officers becomes vacant for any reason, the vacancy may be filled by the Management Committee. All of the officers of the Company shall at all times be and remain subject to the direction and control of the Management Committee. The powers granted to the Management Committee hereunder are subject to Section 4.1(b).

## **ARTICLE 6. TRANSFERS OF UNITS; ADMISSION OF NEW MEMBERS**

### **6.1 General Restriction.**

Each and every Unit issued pursuant to this Agreement is and shall be held, owned and transferred subject to the terms and conditions contained herein. Subject to Section 4.1, no Units shall be Transferred, for consideration or otherwise, whether voluntarily, involuntarily, or by operation of law, and no purported Transferee shall be recognized as a member of the Company for any purpose whatsoever unless and until the Transferee has signed a counterpart signature page to this Agreement and one of the following conditions is satisfied: (i) a majority of the non-Transferring Members consent to the proposed Transfer or (ii) such Units have been Transferred, sold, or released from restriction upon Transfer in accordance with the provisions of this Agreement. A Transfer, or attempt to Transfer, subject to the provisions of this Agreement shall be deemed to occur whenever any Units are Transferred or are attempted to be Transferred, voluntarily,

involuntarily, or by operation of law, irrespective of whether any change in the record ownership of the Units occurs.

## 6.2 Disposition of Units

(a) No Member may directly or indirectly Transfer all or a portion of its Units ("ROFR Units") to any third party (including any other Member or affiliate thereof) without first providing written notice (a "ROFR Notice") of such intended transaction to the Company and to each other Member, including (1) the identity of the proposed transferee, (2) the total number of Units contemplated to be transferred, (3) the purchase price thereof, which must be stated in United States dollars (the "ROFR Price"), and (4) all other terms on which such Units are proposed to be transferred to the proposed Transferee. With respect to any ROFR Units that are proposed to be Transferred from time to time, the Company and the Members shall have the following rights:

- (i) Within twenty (20) days following the receipt of a ROFR Notice, the Company shall have an option to purchase all (but not less than all) of the ROFR Units offered in such ROFR Notice. The Company's option shall be exercisable upon the approval of the Members (other than the transferring Member) holding at least fifty-one (51%) percent of the Units then outstanding (not including the Units held by the transferor Member).
- (ii) If the Company fails to exercise its option pursuant to Section 6.2(a)(i) then within twenty (20) days (the "Member ROFR Period") following the earlier of (i) the expiration of such option period or (ii) such time as the Company's option is not elected to be exercised and the Members are notified in writing (e-mail being sufficient) of such non-election by the Company, the Members (other than the transferring Member) shall be entitled to purchase all or a portion of its pro rata portion of the ROFR Units of the transferor Member. Each Member electing to purchase its pro rata portion of the ROFR Units shall notify in writing the Company and the transferring Member of such election prior to the expiration of the Member ROFR Period.
- (iii) If a Member does not elect to purchase all or a portion its pro rata portion of the ROFR Units, then upon the expiration of the Member ROFR Period, any Member electing to exercise its rights under Section 6.2(a)(ii) to purchase the entirety of its pro rata portion shall be notified by the Company of the opportunity to purchase all or a portion of such remaining ROFR Units ("Remaining ROFR Units"). Such Member shall have fifteen (15) days to elect to purchase all such Remaining ROFR Units. If more than one Member is eligible to purchase Remaining ROFR Units pursuant to this Section 6.2(a)(iii) such Members shall be entitled to purchase their ratable portion of such Remaining ROFR Units, determined based on the ratio of Units held by such Member relative to the Units held by all such eligible Members.

(b) If the Company and the other Members fail to exercise their options under this Section, then the Transferor shall be free to transfer ownership of his or her Units in accordance with the terms of such Transfer as set forth in the ROFR Notice given to the Company and the other

Members; provided, that the purchaser of such Units shall take them subject to the terms and restrictions imposed by this Agreement and shall become a party hereto; and provided further that if the proposed Transfer is not consummated within thirty (30) days of the later of (i) such time as the rights of the Company and the Members to elect to purchase any ROFR Units pursuant to Section 6.2(a) has expired or (ii) all such possible elections pursuant to Section 6.2(a) have been made, the Transferor Member's right to sell such Units shall be deemed to have lapsed, and any sale of such Member's Units without again complying Section 6.2(a) shall be null and void and deemed to be in violation of this Agreement.

### **6.3 Other Transfers**

(a) Any one or more of the following events or conditions shall be deemed to constitute an offer to sell Units held by any Member:

- (i) the filing of a petition in bankruptcy by or against the Member;
- (ii) an adjudication that the Member (to the extent a Member is an individual) is an insane or incompetent person;
- (iii) any assignment by the Member for the benefit of its creditors;
- (iv) to the extent a Member is an individual, any direct or indirect Transfer, award, or confirmation of any such Units to the Member's spouse pursuant to a decree of divorce, dissolution, or separate maintenance, or pursuant to a property settlement or separation agreement;
- (v) sale upon the execution or in foreclosure of any pledge, hypothecation, lien or charge; or
- (vi) any other event which, were it not for the provisions of this Agreement, would cause any such Units to be sold, assigned, pledged, encumbered, awarded, confirmed, or otherwise Transferred, for consideration or otherwise, to any person, whether voluntarily, involuntarily, or by operation of law under circumstances that would not bring such event within Section 6.2 of this Agreement.

(b) Upon the occurrence of any event specified in Section 6.3(a) (except Section 6.3(a)(iv)), the remaining Members and the Company shall have the right to purchase such Units on the same terms and conditions as if such Member had made an offer to sell such Units pursuant to Section 6.2 (for the avoidance of doubt, the price for such Units shall be the price set forth in Section 6.4(a)). Upon the occurrence of an event specified in Section 6.3(a)(iv), first the Member (within the twenty (20) day period provided in Section 6.3(c)) and then the remaining Members and the Company shall have the right to purchase such Units from the Member's spouse in accordance with Section 6.2.

(c) Within twenty (20) days after the occurrence of an event described in Section 6.3(a), the Member or his or her trustee in bankruptcy, personal representative, guardian, executor, or administrator (as appropriate) shall give notice to the Company and the other Members of such event, specifying the date of such event, describing in reasonable detail the nature of the event, the Units affected, and the price or value of the Units, if any, offered by any person or decreed by a court in connection with such event. Such notice shall be deemed to be the Offer Notice for purposes of Section 6.2. If the Company and the other Members have not received this notice upon the expiration of the thirty-day period, any Member, Manager or officer of the Company who has knowledge of such event may give notice to the Company and the other Members at any time after the end of such period, and the notice shall be deemed to be the Offer Notice for all purposes of this Agreement.

#### **6.4 Purchase Price and Terms for the Purchase and Sale of Units**

(a) For purposes of this Agreement, subject to Section 6.4(b), the value of all of the outstanding Units shall be the amount set forth in the Certificate of Value prepared upon the end of the immediately preceding fiscal year. The parties hereto shall execute, upon signing this Agreement and annually within ninety (90) days following the close of each fiscal year, a Certificate of Value setting forth the value of all of the outstanding Units as of such time. The form of such Certificate of Value being Exhibit A attached hereto. The Members shall use reasonable, good faith efforts to unanimously agree on the value of all of the outstanding Units to be set forth on a Certificate of Value. In the event that the Members are unable to come to such agreement within ninety (90) days of the close of the applicable fiscal year (the "Member Valuation Period"), the Company shall retain an appraisal firm (the "Appraiser") unaffiliated with the Company or any Manager or Officer or holder of Units (at the Company's sole expense) to determine the fair market value of the Units using valuation methodologies customary in the valuation of the equity of businesses such as the Company and in the same manner as set forth in Sections 6.4(b); provided, that following the expiration of the Member Valuation Period and in connection with the submission of the matter to the appraisal firm each Member shall propose their final assessment of the value of all of the outstanding Units, and in no event shall the valuation as determined by the appraisal firm (i) exceed the highest such final valuation or (ii) be less than the lowest such final valuation proposed by a Member.

(b) The value of all of the outstanding Units shall be determined by utilizing the following appraisal process:

- (i) The Appraiser shall be required to complete their valuation work within twenty (20) business days of being retained. The Company shall promptly furnish to the Appraiser(s) such information concerning its financial condition, earnings, capitalization and business prospects as the Appraiser may reasonably request. The Appraiser will be instructed to solicit the views of the Members regarding all relevant matters, including the value of the Units, and the value and prospects of the Company.
- (ii) The Appraiser shall determine the fair market value of the Units as of a recent date selected by the Appraiser using valuation methodologies

customary in the valuation of the equity of businesses such as the Company. The Appraiser shall be instructed to express their valuation opinion in the form of a single value for the Units that in the opinion of the Appraiser most closely approximates the fair market value thereof in light of the methodologies used by the Appraiser in valuing such shares. If the Appraiser shall fail to express its assessment of the value of the Units in a single value but instead expresses its assessment as one or more ranges of values, then the Appraiser shall be deemed to have expressed as its single value for each the midpoint of the highest and lowest values of all ranges expressed. The value of the Units as determined by the Appraiser in accordance with the foregoing procedure shall be disclosed in writing to the Company and holders of Units promptly following the completion of the appraisal. The fair market value of the Units determined in accordance with the foregoing procedure shall be final, binding and non-appealable on the Company, the Management Committee and the holders of the Units and their estates.

(c) For the avoidance of doubt, the purchase price of the Units of a Member shall be determined by multiplying the value of all of the outstanding Units by a fraction, the numerator of which is the number of Units owned by the Member and the denominator of which is the total number of Units outstanding.

(d) In the event the selling Member, his or her estate, or any transferee shall not be paid in full in cash at the closing of a sale, then any note given by the purchasing party, in addition to terms customarily found in similarly situated notes, shall provide as follows:

- (i) The note shall require payment of the principal amount in twenty (20) equal consecutive quarterly installments together with interest per annum at the prime rate effective on the date of the note.
- (ii) The note shall allow the prepayment of all or any part of the principal amount at any time without penalty.
- (iii) As security for the note, the purchasing party or parties shall execute a pledge of the Units being purchased and sold in favor of any holder of the note.
- (iv) The note shall be executed by all purchasing parties as makers, and all purchasing parties shall be jointly and severally liable for full payment according to its terms.
- (v) The payment of reasonable costs of collection, court costs, and attorneys' fees incurred upon any default by the maker.
- (vi) No dividends shall be declared or paid upon the outstanding Units of the Company until the purchase price of the Units on any corporate purchase



shall be paid in full; provided, however, that this prohibition on dividends shall not apply to tax distributions.

- (vii) Except as may otherwise be agreed amongst the selling party and the purchasing party, the selling party shall Transfer the Units to the purchasing party at closing free and clear of all encumbrances except those, if any, arising out of this Agreement.

## **6.5 Permitted Transfers**

This Article 6. does not apply to or preclude any transfer made (a) by any Member pursuant to an Approved Sale, (b) by any Member, other than an individual, of Units to or among any Affiliate(s) of such Member (including any Person controlled by such Member), provided that any ownership interests in any such Affiliate(s) will be subject to the transfer restrictions of this Agreement as if such interests were Units of the Company, or (c) for customary and reasonable estate or tax planning purposes. As a condition to any permitted transfer of Units, any transferee (other than any transferee that is already a Member) of Units will be required to become a party to the Agreement by executing a joinder to this Agreement in a form reasonably acceptable to the Management Committee.

## **ARTICLE 7.**

### **ADDITIONAL PROVISIONS CONCERNING MEMBERS**

#### **7.1 No Employment Rights**

Neither the relationship among the Members or between the Members and the Company nor anything contained in this Agreement shall be construed to create any right of a Member to be employed by the Company or any of its Affiliates. Any right of a Member to be employed by the Company or any of its Affiliates other than as an employee terminable at-will and any agreement relating to the terms and conditions of employment or the termination of employment shall be invalid and unenforceable unless they are set forth in a duly authorized written agreement signed by the applicable company. Each Member hereby expressly waives any implied rights to be employed by the Company or any of its Affiliates except to the extent set forth in such a written agreement.

#### **7.2 No Redemption or Repurchase Rights**

No redemption or repurchase of any Units of a Member by the Company shall imply, or be construed to create, a right by any other Member to require the Company to redeem or repurchase any or all of such Member's Units. The Company shall have no obligation to purchase Units except as expressly set forth in a duly authorized written agreement signed by the Company.

#### **7.3 Other Activities; No Usurpation of Opportunity**

Subject to Section 7.6, the Management Committee, Members and their Affiliates may engage in or possess an interest in other business ventures or investments of any kind, independently or with

others. The fact that any Manager, Member or Affiliate may avail itself of such opportunities, either by itself or with other Persons and not offer such opportunities to the Company or any of its Affiliates or to any other Member, shall not subject such Manager, Member or Affiliate to liability to the Company or to any other Member on account of lost opportunity. Neither the Company nor any Member shall have any right by virtue of this Agreement or the relationship created hereby in or to such opportunities, or to the income or profits derived therefrom, and the pursuit of such opportunities, shall not be actionable or in violation of this Agreement.

#### **7.4 No Claim to Company's Books, Records or other Assets**

Except as otherwise provided for in this Agreement, as a Member of the Company, each Member acknowledges that such Member has no claim or rights with respect to any of the Company's contracts, documents, books and records, memoranda, files, lists or records of customers or prospective customers, name, telephone numbers, good will, patents, trademarks, trade names, copyrights, other intellectual property rights, or any other asset, tangible or intangible. At the time such Member ceases to hold any Units, each Member shall deliver to the Company all contracts, documents, books and records, memoranda, files, lists, work-papers, notes, instructions, manuals, guides, computer software programs or media, and all other similar and dissimilar written or soft-copy repositories containing any information concerning the Company, including confidential information, and all copies thereof in such Member's possession or under such Member's control, whether prepared by such Member, the Company, or anyone else, except that such Member may retain copies of records needed for tax purposes.

#### **7.5 Confidential Information**

Each Member agrees that, except as specifically authorized by the Company in writing, and except information which is generally known, such Member shall not either while such Member holds any Units or at any time after such Member ceases to hold any Units directly or indirectly use, disseminate, disclose, discuss, lecture upon, or write or publish articles or other similar or dissimilar materials concerning any information disclosed to or conceived or known by such Member during, as a result of, or through such Member's involvement with the Company about (i) the other Members businesses, partners and other activities, (ii) the Company's business, (iii) the terms of this Agreement, or (iv) the Company's customers, prospective customers, suppliers, products, processes, services, methods, formulas, techniques, trade secrets, financial condition, plans, prospects, policies, or procedures, or uses or improvements thereof or know-how related thereto (all of the foregoing collectively the "Confidential Information"). With respect to Confidential Information of a Member (as opposed to Confidential Information of the Company), the disclosing Member needs only the consent of the other Member to disclose such information. Notwithstanding the first sentence of this paragraph, this confidentiality provision shall not apply to: (1) information which is in the public domain through no fault of the disclosing party; (2) information received where such disclosure was not in violation of any obligation by the disclosing party to the other party; or (3) information required to be disclosed by court order or applicable laws provided that the disclosing party gives the other Member reasonable advance notice of such disclosure and works in good faith with the other Member to obtain in camera or other confidential treatment with respect to such disclosure.

## 7.6 Non-Solicit; Non-Compete

This Section 7.6 shall apply only to those Members holding, either directly or with an Affiliate, greater than 5% of the Company's outstanding Units.

(a) During the period beginning on the date of this Agreement and ending on the second (2nd) anniversary of (x), with respect to a Member, the last date when such Member holds any Units or (y) with respect to any member of the Management Committee ceases to be a member thereof, neither such Member (or any Affiliate thereof) nor any such former member of the Management Committee (or any Affiliate thereof) will in any capacity or in association with any other Person:

- (i) engage in, directly or indirectly, or have any other interest in, be employed by, advise or consult with act as a sales associate, broker, contractor, or manager, in whole or in part, for a Competitor; provided, that nothing in this Section 7.6 shall prohibit such Member or former Management Committee member or any of their respective Affiliates from having an interest in, directly or indirectly up to five percent (5%) of the aggregate voting securities of any Person that is a publicly traded Person.
- (ii) employ as an employee, or engage or retain as a consultant or otherwise, any Person who is then or at any time during the twelve (12) month period prior to such contemplated employment or engagement was an employee of or consultant to the Company or any Location; provided, that this Section 7.6(a)(ii) shall not prevent a Member or former Management Committee member or any of their respective Affiliates from employing as an employee or engaging or retaining as a consultant or otherwise an employee, former employee or consultant of the Company or any Location who responds to a general solicitation that is a public solicitation of prospective employees and not directed specifically to any Company or Company employees; or
- (iii) solicit, recruit or attempt to solicit or recruit any employee or consultant who is then or at any time during the twelve (12) month period prior to such contemplated employment or engagement was an employee or consultant of the Company or any Location to leave the employ of the Company or any Location or to become employed as an employee of, or engaged or retained as a consultant by, any other Person; provided, that this Section 7.6(a)(iii) shall not prevent a Member or former Management Committee member or any of their respective Affiliates from soliciting, recruiting or attempting to solicit or recruit, any employee, former employee or consultant of the Company or any Location who responds to a general solicitation that is a public solicitation of prospective employees and not directed specifically to any Company or Company employees or contractors.

(b) The Members (on their own behalf or on behalf of their respective delegates to the Management Committee) acknowledge and agree that all of the conditions and restrictions established in this Section 7.6 are reasonable, taking into account the circumstances surrounding this Agreement. The Members further acknowledge and agree that the Company and/or the Locations and the non-offending Members would be irreparably damaged if a party breaches, or threatens to commit a breach of, any of the covenants set forth in this Section 7.6 (the "Restrictive Covenants") and that any such breach or threatened breach could not be adequately compensated in all cases by monetary damages alone. Accordingly, in addition to any other right or remedy to which the aggrieved party may be entitled, at law or in equity, the Company, the Locations and the non-offending Members shall be entitled to have the Restrictive Covenants specifically enforced against each breaching party by any court of competent jurisdiction, including immediate temporary, preliminary and permanent injunctive relief and, to the extent permitted by law, without the necessity of furnishing any bond or other undertaking.

(c) If any court of competent jurisdiction at any time deems the Restrictive Covenants, or any part thereof, unenforceable because of the duration or geographical scope of such provisions, the other provisions of this Section 7.6 will nevertheless stand and to the full extent consistent with law continue in full force and effect, and it is the intention and desire of the parties that the court treat any provisions of this Agreement which are not fully enforceable as having been modified to the extent deemed necessary by the court to render them reasonable and enforceable, and that the court enforce them to such extent.

## **7.7 Informational Rights**

In addition to the information required to be provided pursuant to Article 8 , the Management Committee shall keep the Members reasonably informed on a timely basis of any material fact, information, litigation, employee relations or other matter that could reasonably be expected to have a material impact on the operations or financial position of the Company and any Location. The Management Committee shall provide all material information relating to the Company or any Location as any Member may reasonably request from time to time.

## **ARTICLE 8. REPORTS AND TAX MATTERS**

### **8.1 Books, Records and Reports.**

(a) The Company shall maintain at its principal office each of the following: (i) a current list of the full names, in alphabetical order, and last known business or residence addresses of the Members; (ii) a copy of the Certificate, all amendments to the Certificate and executed copies of any powers of attorney pursuant to which the Certificate or amendments thereto have been executed; (iii) a copy of this Agreement and any amendments hereto and executed copies of any written powers of attorney pursuant to which this Agreement and any amendments hereto have been executed; (iv) copies of all federal, state and local income tax returns and reports of the Company for its three most recent fiscal years; and (v) copies of any financial statements of the Company for the three most recent fiscal years. The Company books and records may be kept under such permissible method of accounting as the Management Committee may determine. As

provided pursuant to Section 9 of the Act, the foregoing books and records, together with such other information as a Member shall be entitled to review pursuant to Section 9 of the Act, shall be available for inspection and copying by any Member, at its cost and expense, or its duly authorized representative, during ordinary business hours of the Company.

(b) The Management Committee shall cause the Company to prepare and file income tax returns with the appropriate authorities. Within ninety (90) days after the close of each fiscal year of the Company, the Management Committee shall send to each person who was a Member at any time during such fiscal year such information as will be sufficient to prepare documents which may be required to be filed by such Members under applicable federal, state and local income tax laws.

(c) The Company shall deliver to the Members:

- (i) As soon as practicable, but in any event within sixty (60) days after the end of each fiscal year of the Company: (A) a balance sheet as of the end of such year, (B) statements of income and of cash flows for such year, and (C) a statement of members' equity as of the end of such year;
- (ii) As soon as practicable, but in any event within thirty (30) days after the end of each of the first three (3) quarters of each fiscal year of the Company, statements of income and cash flows for such fiscal quarter, and a balance sheet as of the end of such fiscal quarter; and
- (iii) Within ten (10) days after the end of each calendar month, management prepared financial statements, including statements of income and cash flows for such month, and a balance sheet as of the end of such month.

If, for any period, the Company has any Subsidiary whose accounts are consolidated with those of the Company, then in respect of such period the financial statements delivered pursuant to the foregoing sections shall be the consolidated and consolidating financial statements of the Company and all such consolidated Subsidiaries.

## **8.2 Record of Unit Ownership.**

The Management Committee shall maintain a journal of ownership of all of the outstanding Units containing the name and address of each Member and the number and class, if any, of Units held (the "Unit Journal"). The Unit Journal shall be conclusive evidence of the ownership of the Units and status as a Member absent manifest error.

## **8.3 Withholding**

Notwithstanding any other provision of this Agreement, each Member hereby authorizes the Company to withhold and to pay over, or otherwise to pay, any withholding or other taxes payable by the Company or any of its Affiliates (pursuant to any provision of U.S. federal, state or local or non-U.S. law) with respect to such Member or as a result of such Member's participation in the



Company; and if and to the extent that the Company shall be required to withhold or pay any such withholding or other taxes, such Member shall be deemed for all purposes of this Agreement to have received a payment from the company as of the time such withholding or other tax is required to be paid, which payment shall be deemed to be a distribution with respect to such Member's Units. To the extent that the aggregate amount of such payments to a Member for any period exceeds the aggregate distributions that such Member would have received for such period, the Company shall notify such Member as to the amount of such excess and such Member shall make a prompt payment to the Company of such amount (together with interest thereon at the option of the Management Committee). For the avoidance of doubt, any tax or other obligations attributable to tax payable by the Company referred to in this Section 8.3 shall include, without limitation, any "imputed underpayment" imposed on the Company under Section 6225 of the Code and any associated interest or penalties, any taxes, interest or penalties payable by the Company under any similar provisions of state or local tax laws. The provisions of this Section 8.3 shall survive the dissolution of the Company and the withdrawal of any Member or the transfer of any Member's Units.

#### **8.4 Company Representative**

The Management Committee shall designate a Manager to be the "Tax Matters Partner" for purposes of Section 6231 of the Code (prior to its amendment by the Bipartisan Budget Act of 2015 ("BBA")) and the "partnership representative" as provided in Section 6223(a) of the Code (as amended by the BBA) for any tax period subject to the provisions of such Section 6223 of the Code (in either capacity, the "Tax Matters Partner"). The Tax Matters Partner shall be reimbursed for all reasonable out-of-pocket expenses incurred as a result of its duties as Tax Matters Partner, provided that such indemnification shall not be available if the acts or omissions giving rise to such costs shall be determined by a court of competent jurisdiction to have been performed or omitted in willful misconduct, gross negligence or fraud. In the event the Tax Matters Partner resigns as Tax Matters Partner or ceases to hold any Units, such Tax Matters Partner shall thereupon cease to be the Tax Matters Partner, and such other Manager as appointed by the Management Committee shall become the Tax Matters Partner.

#### **8.4 Elections**

In the event of a distribution of property made in the manner provided in Section 734 of the Code, or in the event of a transfer of any Unit permitted by this Agreement made in the manner provided in Section 743 of the Code, the Tax Matters Partner (subject to the approval of the Management Committee) may, but shall not be required to, file an election under Section 743 of the Code in accordance with the procedures set forth in the Treasury regulations promulgated thereunder.

#### **8.5 Tax Classification**

It is the intent of the Members that the Company shall always be operated in a manner consistent with its treatment as a "partnership" for U.S. federal, state and local income and franchise tax purposes. In accordance therewith, (a) no Member shall file any election with any taxing authority to have the Company treated otherwise, and (b) each Member hereby represents, covenants, and warrants that it shall not maintain a position inconsistent with such treatment.

## **ARTICLE 9 DISSOLUTION AND TERMINATION**

### **9.1 Dissolution of the Company**

The Company shall be dissolved upon the earlier occurrence of any of the following events:

(a) the written consent of the members holding at least 75% of the then outstanding Units (the "Supermajority"); or

(b) the entry of a certificate of cancellation, authorized by the Management Committee, under Section 14 of the Act.

### **9.2 Liquidation and Winding Up**

(a) Upon dissolution of the Company, the Management Committee, shall serve as liquidator of the Company (the "Liquidator"). The Liquidator shall, with reasonable speed, wind up the affairs of the Company and liquidate the Property. The Liquidator shall have unlimited discretion to determine the time, manner and terms of any sale of Property having due regard to the activity and condition of the relevant market and general financial and economic conditions and shall be authorized to continue the business of the Company in order to maximize its value as a going concern for eventual sale.

(b) Upon completion of the winding up of the affairs and business of the Company, the assets of the Company shall be distributed by the Liquidator in the following manner and order of priority:

- (i) First, such assets shall be applied to the payment of debts and liabilities of the Company (including any loans from a Manager or Member to the Company) and the payment of expenses of the winding up of the affairs and business of the Company;
- (ii) Second, such assets shall be applied to the setting up of any reserves (to be held by the Liquidator) which the Liquidator may deem necessary or appropriate for any contingent or unforeseen liabilities or obligations of the Company; and
- (iii) Finally, the remainder, if any, of such assets shall be distributed to the Members in accordance with the provisions of Section 3.6.

(c) If any Member shall be indebted to the Company, then until payment of such indebtedness by such Member, the Liquidator shall retain such Member's distributive share of Property and apply the same to the payment of such indebtedness.

(d) The Liquidator shall comply with all requirements of the Act and other applicable law pertaining to the dissolution, winding up and liquidation of a limited liability company.

## **ARTICLE 10 MISCELLANEOUS PROVISIONS**

### **10.1 Definitions**

As used in this Agreement, the following terms shall each have the meaning set forth in this Article (unless the context otherwise requires).

"Act" shall mean the Massachusetts Limited Liability Company Act, as now in effect or as hereafter amended or revised, and any references to sections of the Act shall include any successor provisions of similar tenor or effect.

"Affiliates" of a Person shall mean any Person directly or indirectly controlling, controlled by or under common control with such Person.

"Agreement" shall mean this Limited Liability Company Operating Agreement, as the same may be amended or supplemented from time to time in accordance with the provisions hereof.

"Capital Transaction" means any transaction the proceeds of which are not includable in determining Cash Flow, including, without limitation, a financing or a refinancing of any mortgage on, the receipt of insurance proceeds in the event of a loss, or the sale or other disposition of, or an eminent domain taking of all or substantially all of, any assets of the Company, but excluding the receipt by the Company of capital contributions or the proceeds of loans from any Member.

"Cash Flow" shall mean the gross cash receipts of the Company from its operations less the portions thereof which are used or reserved to pay Company debts, expenses and other obligations, to make capital expenditures or to facilitate the Company's future operations.

"Code" shall mean the Internal Revenue Code of 1986, as now in effect or as hereafter amended.

"Competitor" shall mean any Person engaged, directly or indirectly, in the same or similar business as the Business.

"Depreciation" shall mean, for each fiscal year, an amount equal to the depreciation, amortization, or other cost recovery deduction allowable for federal income tax purposes with respect to an asset for such fiscal year, except that (a) with respect to any asset the Gross Asset Value of which differs from its adjusted tax basis for federal income tax purposes at the beginning of such fiscal year and which difference is being eliminated by use of the "remedial method" as defined by Treasury Regulations Section 1.704-3(d), Depreciation for such fiscal year shall be the amount of book basis recovered for such fiscal year under the rules prescribed by Treasury Regulations Section 1.704-3(d)(2), and (b) with respect to any other asset the Gross Asset Value of which differs from its adjusted tax basis for federal income tax purposes at the beginning of such fiscal year, Depreciation shall be an amount which bears the same ratio to such beginning Gross Asset Value as the federal

income tax depreciation, amortization, or other cost recovery deduction for such fiscal year bears to such beginning adjusted tax basis; provided, however, that in the case of clause (b) above, if the adjusted tax basis for federal income tax purposes of an asset at the beginning of such fiscal year is zero, then, Depreciation shall be determined with reference to such beginning Gross Asset Value using any reasonable method selected by the Management Committee.

"Gross Asset Value" shall mean, with respect to any asset, the asset's adjusted basis for federal income tax purposes, except as follows: (i) the initial Gross Asset Value of any asset contributed by a Member to the Company is the gross fair market value of such asset as determined by the Management Committee and such Member at the time of contribution; (ii) the Gross Asset Value of all Company assets may be adjusted to equal their respective gross fair market values, as determined by the Management Committee, as of the following times: (a) the acquisition of an additional interest in the Company by any new or existing Member in exchange for more than a de minimis capital contribution; (b) the distribution by the Company to a Member of more than a de minimis amount of property as consideration for an interest in the Company; (c) the grant of an interest in the Company as consideration for the provision of services to or for the benefit of the Company by an existing Member acting in a Member capacity, or by a new Member acting in a Member capacity or in anticipation of becoming a Member; and (d) the liquidation of the Company within the meaning of Treasury Regulations Section 1.704-1(b)(2)(ii)(g); provided, however, that the adjustments pursuant to the foregoing clauses (a), (b), (c) and (d) shall be made only if the Management Committee reasonably determines that such adjustments are necessary or appropriate to reflect the relative economic interests of the Members in the Company; (iii) the Gross Asset Value of any Company asset distributed to any Member shall be adjusted to equal the gross fair market value of such asset on the date of distribution as determined by the Management Committee and (iv) the Gross Asset Value of all property shall be increased (or decreased) to reflect any adjustments to the adjusted basis of such property pursuant to Code Section 734(b) or Code Section 743(b), but only to the extent that such adjustments are taken into account in determining Capital Accounts pursuant to Treasury Regulations Section 1.704-1(b)(2)(iv)(m) and clause (vi) of the definition of Net Profits and Net Losses. If the Gross Asset Value of a Company asset has been determined or adjusted pursuant to clause (i), (ii) or (iv) above, such Gross Asset Value shall thereafter be adjusted by Depreciation taken into account with respect to such asset for purposes of computing Net Profits or Net Losses.

"Member" shall mean each Person who holds any Units.

"Net Profits" and "Net Losses" shall mean, for each Fiscal Year or other period, an amount equal to the Company's taxable income or loss for such Fiscal Year or period, determined in accordance with Code Section 703(a) (for this purpose, all items of income, gain, loss or deduction required to be stated separately pursuant to Code Section 703(a)(1) shall be included in taxable income or loss) with the following adjustments (without duplication): (i) any income of the Company that is exempt from federal income tax and to the extent not otherwise taken into account in computing Net Profits or Net Losses pursuant to this definition, shall be added to such income or loss; (ii) any expenditures of the Company described in Code Section 705(a)(2)(B) or treated as Code Section 705(a)(2)(B) expenditures pursuant to Treasury Regulations Section 1.704-1(b)(2)(iv)(i), and to the extent not otherwise taken into account in computing Net Profits or Net Losses pursuant to this definition, shall be subtracted from such taxable income or loss; (iii) in the event the Gross Asset

Value of any Company asset is adjusted pursuant to clauses (ii) or (iii) of the definition of Gross Asset Value herein, the amount of such adjustment shall be taken into account as gain or loss from the disposition of such asset for purposes of computing Net Profits or Net Losses; (iv) gain or loss resulting from any disposition of Company property with respect to which gain or loss is recognized for federal income tax purposes shall be computed by reference to the Gross Asset Value of the property disposed of, notwithstanding that the adjusted tax basis of such property differs from its Gross Asset Value; (v) in lieu of depreciation, amortization, and other cost recovery deductions taken into account in computing such taxable income or loss, there shall be taken into account Depreciation for such Fiscal Year; (vi) to the extent an adjustment to the adjusted tax basis of any asset pursuant to Code Section 734(b) is required, pursuant to Treasury Regulations Section 1.704-1(b)(2)(iv)(m)(4), to be taken into account in determining Capital Account balances as a result of a distribution other than in liquidation of a Member's interest in the Company, the amount of such adjustment shall be treated as an item of gain (if the adjustment increases the basis of the asset) or an item of loss (if the adjustment decreases such basis) from the disposition of such asset and shall be taken into account for purposes of computing Net Profits and Net Losses; and (vii) any items which are specially allocated pursuant to this Agreement shall not be taken into account in computing Net Profits or Net Losses.

"Person" shall mean and include an individual, corporation, partnership, association, limited liability company, trust, estate, or other entity.

"Property" shall mean, at any time, all property, whether real or personal, interests, assets or rights owned or held by or on behalf of the Company at such time.

"Subsidiary" shall mean means, with respect to any Person, any corporation, limited liability company, partnership, association or business entity of which (a) if a corporation, a majority of the total voting power of shares of stock entitled (without regard to the occurrence of any contingency) to vote in the election of directors, managers or trustees thereof is at the time owned or controlled, directly or indirectly, by that Person or one or more of the other Subsidiaries of that Person or a combination thereof, or (b) if a limited liability company, partnership, association or other business entity (other than a corporation), a majority of partnership or other similar ownership interest thereof is at the time owned or controlled, directly or indirectly, by any Person or one or more Subsidiaries of that Person or a combination thereof.

"Transfer" shall mean any sale, transfer, assignment, pledge, mortgage, exchange, hypothecation, grant of a security interest or other disposition or encumbrance of an interest (whether with or without consideration, whether voluntarily or involuntarily or by operation of law). The terms "Transferee," "Transferor," "Transferred," and other forms of the word "Transfer" shall have the correlative meanings.

"Units" shall mean units of ownership interest in the Company into which the Members' ownership interests in the Company are divided. The Units are set forth opposite each Member's name on Schedule 1, and thereafter the Units held by a Member shall be reflected in the Unit Journal. Unless otherwise specifically stated to the contrary, references to Units herein shall mean all classes of Units.



## **10.2 Notices**

All notices or other communications required or permitted to be given pursuant to this Agreement shall be in writing and shall be considered as properly given and received on date of delivery if delivered personally or by facsimile, or on the second day after deposit in the United States mail if mailed by prepaid first-class registered or certified mail, addressed to such Member or Manager at such Member's or Manager's address in the records of the Company.

## **10.3 Governing Law**

This Agreement shall be governed by and construed in accordance with the substantive laws of the Commonwealth of Massachusetts, without regard to conflicts of law principles. For purposes of any action or proceeding involving this agreement, each Member hereby expressly submits to the jurisdiction of all federal and state courts located in the Commonwealth of Massachusetts and consents that any order, process, notice of motion or other application to or by any of said courts or a judge thereof may be served within or without such court's jurisdiction by registered mail or by personal service, provided a reasonable time for appearance is allowed (but not less than the time otherwise afforded by any law or rule), and waives any right to contest the appropriateness of any action brought in any such court based upon lack of personal jurisdiction, improper venue or forum *non conveniens*.

## **10.4 Successors and Assigns**

This Agreement and all the terms and provisions hereof shall be binding upon and shall inure to the benefit of the Members and their respective heirs, executors, administrators, successors and permitted assigns. Any person acquiring or claiming an interest in the Company, in any manner whatsoever, shall be subject to and bound by all the terms, conditions and obligations of this Agreement to which its predecessor in interest was subject or bound, without regard to whether such person has executed this Agreement or a counterpart hereof or any other document contemplated hereby. No person shall have any rights or obligations relating to the Company greater than those set forth in this Agreement, and no person shall acquire an interest in the Company or become a Member except as permitted by the terms of this Agreement.

## **10.5 Counterparts**

This Agreement may be executed in any number of identical counterparts, each of which, for all purposes, shall be deemed an original, and all of which constitute, collectively, one and the same Agreement. In addition, this Agreement may contain more than one counterpart signature page and may be executed by the affixing of the signature of each of the Members to one of such counterpart signature pages, and all such counterpart signature pages shall be read as one and shall have the same force and effect as though all the signers had signed the same signature page.

## **10.6 Additional Assurances**

Upon the request of the Company, each Member agrees to the extent commercially reasonable to perform all further acts and execute, acknowledge and deliver any documents which the Company deems reasonably necessary to effectuate the provisions of this Agreement.

## **10.7 Entire Agreement; Amendment of Agreement**

This Agreement constitutes the entire understanding of the parties hereto with respect to the subject matter hereof and supersedes any and all prior negotiations, understandings and agreements in regard hereto. Neither the Certificate nor this Agreement may be amended or modified, except with the consent of the Supermajority, except that the Management Committee alone may effect (i) amendments to Schedule 1 from time to time to reflect changes in the Members of the Company, and (ii) non-substantive amendments needed to correct typographical errors. Notwithstanding the foregoing, this Agreement may not be amended or modified, except with the written consent of all Members, if such proposed modification or amendment will adversely affect the interests of any one Member disproportionately to other Members.

## **10.8 Partition**

Each of the parties hereto irrevocably waives during the term of the Company any right that such party may have to maintain any action for partition with respect to the Property.

## **10.9 No Waiver**

Failure or delay of any party in exercising any right or remedy under this Agreement, or any other agreement between the parties, or otherwise, will not operate as a waiver thereof. The express waiver by any party of a breach of any provision of this Agreement by any other party shall not operate or be construed as a waiver of any subsequent breach by such party. No waiver will be effective unless and until it is in written form and signed by the waiving party.

## **10.10 Gender and Number**

Wherever from the context it appears appropriate, each term stated in either the singular or plural shall include the singular and plural, and pronouns stated in either the masculine, the feminine or the neuter gender shall include the masculine, feminine and neuter.

## **10.11 Headings**

The captions in this Agreement are inserted for convenience of reference only and shall not affect the construction of this Agreement. References in this Agreement to any Article, Section, Paragraph, Subparagraph or Schedule are to the same contained in this Agreement.

### **10.12 Validity and Severability**

The invalidity, illegality or unenforceability of any provision of this Agreement or the application thereof to any person or circumstance, to any extent, for any reason, shall not affect the validity, legality, or enforceability of the remainder of such provision, or any other provision hereof or the application of any provision to any other person or circumstance, and such provision under this Agreement shall be reformed to the extent necessary to effectuate the foregoing, it being intended that the rights and obligations of the parties hereto be enforceable to the fullest extent permitted by law.

### **10.13 No Third Party Rights**

This Agreement and the covenants and agreements contained herein are solely for the benefit of the parties hereto. No other person shall be entitled to enforce or make any claims, or have any right pursuant to the provisions of this Agreement.

### **10.14 Dispute Resolution**

All disputes arising under this Agreement shall be subject to binding arbitration administered by JAMS Comprehensive Arbitration Rules and Procedures. Arbitration shall be conducted by a single JAMS neutral arbitrator appointed by mutual agreement of the Members, and in the absence of such agreement, by JAMS. The validity, construction and interpretation of this Agreement, and all procedural aspects of the arbitration conducted pursuant to this Agreement shall be decided by the arbitrator. It is agreed that the arbitrator shall have no authority to award treble, exemplary, or punitive damages of any type whether or not such damages may be available under state or federal law, the parties hereby waiving their rights, if any, to receive such damages. In interpreting the substance of the dispute, the arbitrator shall refer to the internal laws of the Commonwealth of Massachusetts. The arbitration proceeding shall be conducted in Boston, Massachusetts, or in any other mutually agreed upon location.


**[SCHEDULE 1 FOLLOWS]**

**SCHEDULE 1****MEMBERSHIP INTERESTS****Class A Units**

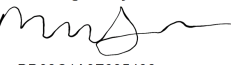
<b>Name and Address</b>	<b>Percentage Interest</b>	<b>Initial Capital Contribution</b>
Christine Argiros d/b/a Greentech 770 Ventures LLC P.O. Box 262 Norwood, MA 02062	82%	\$0
Michelle Foley 47 Ralph Talbot Street South Weymouth, MA 02190	12%	\$0
Richard Parsons 371 Belmont Street Quincy, MA 02170	6%	\$0

**[SIGNATURE PAGE FOLLOWS]**

## MEMBERS

DocuSigned by:  
  
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**Christine Argiros, Manager**  
d/b/a Greentech 770 Ventures LLC

DocuSigned by:  
  
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**Michelle Foley, Manager**

DocuSigned by:  
  
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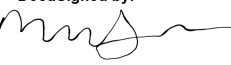
**Richard Parsons, Manager**

## MANAGERS


### Class A Unit **Managers**

DocuSigned by:  
  
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**Christine Argiros, Manager**  
d/b/a Greentech 770 Ventures LLC

DocuSigned by:  
  
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**Michelle Foley, Manager**

DocuSigned by:  
  
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**Richard Parsons, Manager**





IN WITNESS WHEREOF, the parties have executed this Certificate of Value;  
as of October 15, 2023.

SURF'S UP CANNABIS OPERATIONS LLC

DocuSigned by:

*Christine Argiros*

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**Christine Argiros, Manager**  
d/b/a Greentech 770 Ventures LLC

DocuSigned by:

*Michelle Foley*

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**Michelle Foley, Manager**

DocuSigned by:

*Richard Parsons*

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**Richard Parsons, Manager**

In accordance with the Cannabis Control Commission's RFI requirements received on December 6, 2023 I, Christine Argiros, certify under the pain and penalties of perjury that Randy Kaston is not a Person Having Direct or Indirect Control (PDIC) as defined by the Commission's definitions section of the regulations, 935 CMR 500.101(1). Ms. Kaston is the Director of Business Law Group at Ligris and Associates PC, and specializes in commercial and residential transactions. I have been a long time client of the firm. As my attorney, Ms. Kaston serves as the designated resident agent for GreenTech 770 Ventures LLC. Ms. Kaston has no equity or control in either GreenTech 770 Ventures LLC or Surf's Up Cannabis Ventures LLC.

SIGNATURE:



Christine Argiros, Managing Member  
Surf's Up Cannabis Ventures LLC

**Notary Public:**

On this \_\_\_\_ day of December, 2023, before me, the undersigned notary public, Christine Argiros, personally appeared, proved to me through satisfactory evidence of identification, which were personally known to be the person who signed the above statement in my presence and who swore or affirmed to me that the content of this statement are truthful and accurate to the best of her knowledge and belief.

Official Seal of Notary Public:



**Surf's Up Cannabis Ventures LLC  
Plan for Obtaining Liability Insurance**

**I. Purpose**

The purpose of this plan is to outline how Surf's Up Cannabis Ventures LLC ("SU") will obtain and maintain the required General Liability and Product Liability insurance coverage as required pursuant to 935 CMR 500.105(10), or otherwise comply with this requirement.

**II. Research**

SU has engaged with multiple insurance providers offering General and Product Liability Insurance coverage in the amounts required in 935 CMR 500.105(10). These providers are established in the legal marijuana industry. We are continuing these discussions with the insurance providers and will engage with the provider who best suits the needs of the company once we receive a Provisional License.

**III. Plan**

1. Once SU receives its Provisional Marijuana Establishment License, we will engage with an insurance provider who is experienced in the legal marijuana industry.
  - a. SU will obtain and maintain general liability insurance coverage for no less than \$1,000,000 per occurrence and \$2,000,000 in aggregate, annually, and product liability insurance coverage for no less than \$1,000,000 per occurrence and \$2,000,000 in aggregate, annually.
  - b. The deductible for each policy will be no higher than \$5,000 per occurrence.
  - c. Vehicles used for pick-up and delivery shall carry liability insurance in an amount not less than \$1,000,000 combined single limit.
2. In the event that SU cannot obtain the required insurance coverage, SU will place a minimum of \$250,000 in an escrow account. These funds will be used solely for the coverage of these liabilities.
  - a. SU will replenish this account within ten business days of any expenditure.
  - b. SU will maintain reports documenting compliance with 935 CMR 500.105(10) in a manner and form determined by the Commission and make these reports available to the Commission up request.

# Surf's Up Cannabis Ventures, LLC

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## Business Plan

### Cannabis Retail Opportunity

Surf's Up Cannabis Ventures, LLC ("Surf's Up") seeks to locate an adult-use marijuana retail license at 770 Gallivan Boulevard, Dorchester, MA 02122. Our team will provide high-quality cannabis and cannabis products from wholesalers as well as craft manufacturers at a convenient location with access to ample public transit and with 47 dedicated parking spaces – representing the largest amount of dedicated parking for any cannabis establishment in the City of Boston.

A key to our success will be providing outstanding customer service to both our customers as well as the surrounding Dorchester community -- all within an exceptionally maintained facility. We plan to be open Monday-Saturday 10am-10pm and on Sunday from 10am-8pm

### Why Surf's Up?

Surf's Up is a singularly qualified organization of proven professionals in the cannabis industry with impeccable safety records, highly trained and attentive customer service teams, and unparalleled partners within the communities where they have operated cannabis facilities.

Two of our team's Co-Founders, Richard Parsons and Michelle Foley, are a highly experienced retail team committed to compliance and community – having successfully managed 5 cannabis retail facilities in Massachusetts, with locations in Boston, Cambridge, Needham, Watertown, and Somerville.

Mr. Parsons currently manages a successful medical marijuana dispensary in Needham for the past 5 years with a perfect, incident free track record. Mr. Parsons' family has also lived in Adams Village in Dorchester since 1916 and will be the General Manager of Surf's Up proposed location at 770 Gallivan Boulevard.

Co-Founder and operations manager Michelle Foley has successfully run multiple, well-established retail as well as professional cannabis locations both in and around Boston. Ms. Foley has a spotless record for safety and compliance for cannabis retail locations.

### Challenges

Surf's Up has identified three distinct retail challenges in the Dorchester area that we are uniquely qualified to solve with our proposed cannabis facility:

- **Location** – Dorchester needs a professional retail cannabis operation that is safe and secure within existing commercially-zoned areas.
- **Diversity** – Employment opportunities are needed for local, diverse candidates to work alongside a proven and professional retail cannabis team.

- **Community** – Dorchester is a tight-knit community looking for the right cannabis team with a mind toward the neighborhood’s history and needs.

## Our Solutions

Surf’s Up is a proud local cannabis company providing high quality products with years of exceptional experience in the cannabis industry. Our team has identified the ideal location at 770 Gallivan Boulevard in Dorchester to serve customers and the community in a way that sets the standard for cannabis operations city-wide.

Surf’s Up recognizes that our Dorchester neighborhood wants to work with people that have a proven track record of success, that have a deep knowledge of cannabis, and that have a hands-on, community-first approach. We believe in the work we do very deeply, and we understand that it is our Dorchester neighbors that are looking to us to develop a safe, secure, and professional facility that complements the community.

We want the neighborhood we serve to understand that they have a reliable partner willing to hire local, diverse candidates for its retail positions. We also understand this community needs a retail team that will listen, respond, and care for the neighborhood.

Surf’s Up is proud of the integrity and experience of our team as well as our commitment to the community as a responsible neighbor. We know we can meet the needs and expectations of our Dorchester neighbors and the customers we plan to serve.

## Solution #1 - Location

***Challenge:*** *Dorchester needs a professional retail cannabis operation that is safe and secure within existing commercially zoned areas*

Surf’s Up location at 770 Gallivan Boulevard is within the Dorchester Neighborhood Shopping (“NS”) zoning district and is currently unoccupied in anticipation of Surf’s Up tenancy. However, this location has previously hosted a high-volume Verizon retail store, as well as a busy regional COVID-19 testing site. The site’s only direct abutter on Gallivan Boulevard is a commercially zoned AutoZone retail store to the site’s immediate west. Just beyond AutoZone, Clover Street one-way exits out to Gallivan Boulevard, preventing commercial traffic from turning into the neighboring residential parcels. AutoZone, 770 Gallivan’s extensive two-parcel parking lot, and existing green buffering and fencing which surround 770 Gallivan, separate and buffer the proposed building from any direct abutters, both on Clover and Minot Streets.

Surf’s Up location at 770 Gallivan Boulevard would represent the largest amount of dedicated parking for any cannabis establishment in the City, with a lot comprised of 72 existing, dedicated parking spaces.

Additionally, the site has ample access to multimodal public transit options at Neponset Circle, is located one mile from the Cedar Grove MBTA Station, and a mere 1000 feet from two #201 MBTA bus stops (Gallivan Blvd@Hallet Street and Neponset Ave@Minot Street), two #210 MBTA bus stops (Neponset Ave@Minot Street and 398 Neponset Ave@Neponset Health Center), and one #202 MBTA bus stop (Neponset Ave@Minot Street). Surf’s Up will also install and maintain a secure bike rack at its facility. All employees will receive subsidization for public transportation. Finally, Surf’s Up intends to engage in



conversations with the Boston Transportation Department regarding a rideshare drop-off/pickup location.

## Safety and Security

Our Surf's Up team led a public engagement effort with neighbors and community groups to solicit feedback on the needs of the community. Above all else, our neighbors in Dorchester asked that a safe, secure, and well-maintained facility be placed at the 770 Gallivan Boulevard location. Surf's Up is uniquely qualified to meet this standard.

Surf's Up co-founders Richard Parsons and Michelle Foley have a combined decade of cannabis retail management experience with a record of zero state or municipal deficiencies or any incidents related to health, safety, or security. This record has set the "gold standard" for cannabis retail compliance within the Commonwealth of Massachusetts with the state Cannabis Control Commission frequently utilizing Mr. Parsons and Ms. Foley managed locations to train new inspectors on what a compliant retail store should look like—a fact highlighted in regional news media coverage. This extensive experience and proven record of compliance is built atop a combined more than 50-year retail management careers as general managers of high-volume retail stores located on Newbury Street.

The facility at 770 Gallivan Boulevard is designed for maximum efficiency. All product is kept in a secure limited access vault and no product will be on the sales floor except in locked display cases. The average customer transaction time is 3-5 minutes, and Surf's Up will be offering order ahead and in store kiosk ordering which both decrease the average transaction time. We are always implementing new software and processes to further streamline our operations. As a result, we can process customers quickly and maintain a safe and secure area in and around the dispensary.

Our team's security measures meet or exceed all standards for local banks and financial institutions. This means that this facility will be one of the safest locations in Dorchester. In addition to our well-trained staff, the facility is monitored 24/7 by cameras and alarms, and access to all our products is tightly controlled – only certain employees have access to the secured vault where products are stored.

Under the management of the Surf's Up team's co-founders, our stores have had zero incidents for theft, diversion, or public nuisance.

## Solution #2 - Diversity

**Challenge:** *Employment opportunities are needed for local, diverse candidates to work alongside a proven and professional retail cannabis team*

Surf's Up seeks to employ City of Boston and specifically Dorchester neighborhood residents, minorities, women, and individuals with past criminal records. Surf's Up has developed a comprehensive employment plan and, in an effort to attract Dorchester and Boston residents, Surf's Up will leverage its deep and existing relationships with community leaders and neighborhood groups to share its hiring needs and encourage residents to apply for open positions.

As part of our **Dorchester First** program, Surf's Up has committed to hiring qualified residents first, with approximately 30 positions expected to be created. We will offer competitive wages with excellent benefits – among them will be 401k, sick leave, health care options, and paid time off.

To attract minorities, women, and individuals with past criminal records, Surf's Up will post hiring needs on various employment websites that target these specific groups such as diversity-focused job boards. Surf's Up will offer all its employees a living wage starting at \$18 per hour, full benefits, and skilled training.

Existing employees will be prioritized for internal career advancements. Throughout its hiring processes, Surf's Up will engage with its longstanding community partners, leaders, and neighborhood organizations for feedback to improve its employment plans.

We believe that we can help facilitate building careers with opportunities for economic mobility by embracing diversity, providing mentorship opportunities for economic empowerment and social equity entrepreneurs, and incorporating diversity and inclusion values throughout all levels of our organization -- with particular focus on minorities and women for hiring, promotion and retention internally.

In addition, Surf's Up will prioritize working with vendors, businesses in its supply chain, and required ancillary services that are owned or managed by minority groups, immigrant populations, women, veterans, people with disabilities, and/or LGBTQ+ individuals. Surf's Up will start by prioritizing these businesses in construction and revitalization efforts for the property and will measure how many of its ancillary services and participants in its supply chain are owned and/or managed by minorities, immigrant populations, women, veterans, people with disabilities, and LGBTQ+ individuals and calculate the percentage of members of its supply chain that meet this requirement.

## Solution #3 - Community

***Challenge:** Dorchester is a tight-knit community looking for the right cannabis team with a mind toward the neighborhood's history and needs*

Surf's Up co-founder and Retail Manager Richard Parsons was born and raised within the Adams Village / Cedar Grove Neighborhood of Dorchester. His family has lived in the neighborhood for over 100 years and remain involved community members at the St. Brendan's Parish and Adam's Street Library.

Surf's Up's co-founders also have a combined decade of cannabis retail management experience with a record of zero state or municipal deficiencies or any incidents related to health, safety, or security. This record has set the "gold standard" for cannabis retail compliance within the Commonwealth of Massachusetts, with the state Cannabis Control Commission frequently utilizing Mr. Parsons and Ms. Foley's managed locations to train new inspectors on what a compliant retail store should look like—a fact highlighted in regional news media coverage. This proven record of compliance is built atop a combined more than 50-year retail management career of high-volume retail stores by both Mr. Parsons and Ms. Foley.

Surf's Up has also secured the support from Boston City Councilor Frank Baker, the Cedar Grove Civic Association, Mr. Steve Collette at 20 Minot Street in Dorchester (a direct abutter to the property), and over 50 Dorchester and Boston residents – all who have signed or submitted statements of support to the City of Boston.

## Competition

We believe that our competition would be some of the larger Medical Dispensaries (RMDs), currently operating Recreational Retailers, and specifically other urban dispensaries in the City of Boston or the nearby City of Quincy. Although the illicit market still exists, as consumers compare the quality of product and consistency the recreational dispensaries offer, we believe the adult-use market will continue to mature and sustain itself.

## Expectations

### Forecast

We are projecting sales of \$15,000,000 in year 1 and \$20,000,000 in year 2 with a profit margin of about 22-25%. This projection assumes an average price of \$70 per customer.

**Commented [JY1]:** This seems high, especially profit margin.

Would say \$10M in first year and \$15M in year 2.

Would project an average price of \$50 per person.

Michelle?

## Target Market

Our Dorchester location is well-suited to serve the surrounding neighborhood as well as traffic along the major arterials at Gallivan Boulevard, Neponset Avenue, and I-93 Southbound for both in-store retail and pick-up.

Given the extensive experience of the Surf's Up retail team, our products, price points, and service appeal directly to a consumer market of 65+ individuals, young professionals, and veterans – a consumer demographic that constitutes the overwhelming majority of cannabis customers.

## Our Advantages

Our location is unrivaled due to its high visibility, accessibility from important arterial roadways, and on-site parking. With our experienced team, we know how an excellent cannabis facility should be operated and maintained to maximize customer and community satisfaction.

Staying true to our mission is another way we differentiate ourselves from competitors in the marketplace. We believe that providing opportunities for the surrounding Dorchester neighbors is a critical, mission centric obligation that we intend to sustain through our existing pledges to give back to the Dorchester community.

In fact, we have **dedicated \$110,000/year for 5 years as part of our Surf's Up Community Benefits Package**. We are working with the Cedar Grove Civic Association to distribute the proceeds by a local community foundation. We believe strongly that this foundation, in whatever form it takes, should be comprised only of community residents and groups where eligibility for funding will be determined solely by the foundation (and not Surf's Up). Some example investments that the community has put forward in public discussions are Dorchester Youth Hockey, Leahy-Holloran Community Center, Dorchester Little League, Gaelic Football, St. Brendan School, and Dorchester Lacrosse. Again, Surf's Up will not be involved in the determination of need. We intend only to distribute the funds for the community to then make the awards as they see fit. We have also pledged that this community benefits package will begin distribution within 6 to 12 months after our doors open at 770 Gallivan Boulevard.

## Company Details

### Ownership & Structure

**Surf's Up Cannabis Ventures LLC (Proposed Licensee)**

- Richard Parsons, LLC Manager and Retail Manager (1 Vote)
- Michelle Foley, LLC Manager and Operations Manager (1 Vote)
- Christine Argiros, LLC Manager (1 Vote)

<u>Beneficial Interest Holders</u>	<u>% Ownership</u>
• GreenTech 770 Ventures, LLC	82.00
o Christine Argiros, LLC Manager	100.00
• Surf's Up Cannabis Operations LLC	18.00
o Richard Parsons, LLC Manager	33.33
o Michelle Foley, LLC Manager	66.66

It should be noted that Richard Parsons has an employee-only relationships with SIRA Naturals, Inc. where he serves as the Needham, MA medical retail location's general manager. Mr. Parsons has no ownership of or control over SIRA Natural, Inc. or its licenses, and has no ownership or control over any other Massachusetts cannabis license.

Michelle Foley is a 4.95% owner and employee retail manager of CastleLeaf LLC, located at 100 Leo M. Birmingham Parkway, Brighton, MA 02135. Ms. Foley has no ownership or control over any other Massachusetts cannabis license.

## Financial Plan

### Key assumptions

Retail annual revenue projections= \$10-20M

MA Wholesale cannabis = \$2500/lb.

Retail Prices: \$3,480/lb. (Sold by the quarter oz) \$6400/lb. (Sold by 1/8<sup>th</sup> oz. at \$50)

Adult use marijuana is subject to:

- State sales tax: 6.25%
- State excise tax: 10.75%
- Local option for cities or towns: up to 3% Total: up to 10% not including Federal income tax

**Commented [JY2]:** @Michelle can you update. Think this is outdated and high based on today's market.

## **Procedures for Quality Control and Testing**

Pursuant to 935 CMR 500.160, Surf's Up Cannabis Ventures, LLC ("SU") will not sell or market any marijuana product that is not capable of being tested by Independent Testing Laboratories, including testing of marijuana products and environmental media. SU will implement a written policy for responding to laboratory results that indicate contaminant levels that are above acceptable levels established in DPH protocols identified in 935 CMR 500.160(1) and subsequent notification to the Commission of such results. Results of any tests will be maintained by SU for at least one year. All transportation of marijuana to or from testing facilities shall comply with 935 CMR 500.105(13) and any marijuana product returned to SU by the testing facility will be disposed of in accordance with 935 CMR 500.105(12). All products shall be tested for the cannabinoid profile and for contaminants as specified by the Department, including but not limited to mold, mildew, heavy metals, plant-growth regulators, and the presence of pesticides.

SU will never sell or market adult-use marijuana products that have not first been tested by an Independent Testing Laboratory and deemed to comply with the standards required under 935 CMR 500.160.

In accordance with 935 CMR 500.130(2), SU will prepare, handle and store all edible marijuana products in compliance with the sanitation requirements in 105 CMR 500.000: *Good Manufacturing Practices for Food*, and with the requirements for food handlers specified in 105 CMR 300.000: *Reportable Diseases, Surveillance, and Isolation and Quarantine Requirements*. In addition, SU's policies include requirements for handling of marijuana, pursuant to 935 CMR 500.105(3), including sanitary measures that include, but are not limited to: hand washing stations; sufficient space for storage of materials; removal of waste; clean floors, walls and ceilings; sanitary building fixtures; sufficient water supply and plumbing; and storage facilities that prevents contamination.

Pursuant to 935 CMR 500.105(11)(a)-(e), SU will provide adequate lighting, ventilation, temperature, humidity, space and equipment, in accordance with applicable provisions of 935 CMR 500.105 and 500.110. SU will have a separate area for storage of marijuana that is outdated, damaged, deteriorated, mislabeled, or contaminated, or whose containers or packaging have been opened or breached, unless such products are destroyed. SU storage areas will be kept in a clean and orderly condition, free from infestations by insects, rodents, birds and any other type of pest. The SU storage areas will be maintained in accordance with the security requirements of 935 CMR 500.110.

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SU's Quality Manager will maintain strict compliance with DPH regulations and protocols for quality control.

All SU agents whose job includes contact with marijuana or nonedible marijuana products is subject to the requirements for food handlers specified in 105 CMR 300.000: *Reportable Diseases, Surveillance, and Isolation and Quarantine Requirements*. All SU agents working in

direct contact with preparation of marijuana or nonedible marijuana products shall conform to sanitary practices while on duty, including personal cleanliness and thorough handwashing. The hand-washing facilities will be adequate and convenient with running water at a suitable temperature and conform with all requirements of 935 CMR 500.105(3)(b)(3).

SU will provide sufficient space for placement of equipment and storage of materials as is necessary for the maintenance of sanitary operations, in accordance with 935 CMR 500.105(3)(b)(4). Litter and waste will be properly removed and disposed of and the operating systems for waste disposal shall be maintained in an adequate manner pursuant to 935 CMR 500.105(12). The floors, ceilings and walls will be constructed in a way that allows them to be adequately cleaned and in good repair. All contact surfaces, including utensils and equipment, shall be maintained in a clean and sanitary condition in compliance with 935 CMR 500.105(3)(b)(9). All toxic items shall be identified, held, and stored in a manner that protects against contamination of marijuana products.

Pursuant to 935 CMR 500.105(3)(b)(11), SU's water supply will be sufficient for necessary operations able to meet our needs. The plumbing requirements of 935 CMR 500.105(3)(b)(12) will be met through adequate size and design and adequately installed and maintained to carry sufficient quantities of water to required locations throughout the SU facility. SU will also provide our employees with adequate, readily accessible toilet facilities that are maintained in sanitary condition and in good repair. All products that can support the rapid growth of undesirable microorganisms will be held in a manner that prevents the growth of these Microorganisms.



## **Personnel Policies Summary**

It is Surf's Up Cannabis Ventures', LLC ("SU") policy to provide equal opportunity in all areas of employment, including recruitment, hiring, training and development, promotions, transfers, termination, layoff, compensation, benefits, social and recreational programs, and all other conditions and privileges of employment, in accordance with applicable federal, state, and local laws. SU will make reasonable accommodations for qualified individuals with known disabilities, in accordance with applicable law.

Management is primarily responsible for seeing that equal employment opportunity policies are implemented, but all members of the staff share the responsibility for ensuring that, by their personal actions, the policies are effective and apply uniformly to everyone. Any employee, including managers, determined by SU to be involved in discriminatory practices are subject to disciplinary action and may be terminated. SU strives to maintain a work environment that is free from discrimination, intimidation, hostility, or other offenses that might interfere with work performance. In keeping with this desire, we will not tolerate any unlawful harassment of employees by anyone, including any manager, co-worker, vendor, or clients.

In accordance with 935 CMR 500.105(2), all current owners, managers, and employees of SU that are involved in the handling and sale of marijuana will successfully complete Responsible Vendor Training Program, and once designated a "responsible vendor" require all new employees involved in handling and sale of marijuana to complete this program within 90 days of hire. This program shall then be completed annually and those not selling or handling marijuana may participate voluntarily. SU will maintain records of responsible vendor training compliance, pursuant to 935 CMR 500.105(2)(b). Responsible vendor training shall include: discussion concerning marijuana effect on the human body; diversion prevention; compliance with tracking requirements; identifying acceptable forms of ID, including medical patient cards; and key state and local laws.

SU will maintain records of compliance with all training requirements pursuant to 935 CMR 500.105(2). The records will be maintained for four years and SU will make the records available for inspection upon request.

All SU policies will include a staffing plan and corresponding records in compliance with 935 CMR 500.105(1)(i) and ensure that all employees are aware of the alcohol, smoke, and drug-free workplace policies in accordance with 935 CMR 500.105(1)(k). SU will also implement policies to ensure the maintenance of confidential information pursuant to 935 CMR 500.105(1)(l). SU will enforce a policy for the immediate dismissal of agents for prohibited offenses including but not limited to diversion of marijuana, unsafe practices, or a conviction or guilty pleas for a felony

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charge of distribution to a minor according to 935 CMR 105(1)(m).

All SU employees will be duly registered as marijuana establishment agents and have to complete a background check in accordance with 935 CMR 500.030(1). All marijuana establishment agents will complete a training course administered by SU and complete a Responsible Vendor Program in compliance with 935 CMR 500.105(2)(b). Employees will be required to receive a minimum of eight hours of on-going training annually pursuant to 935 CMR 500.105(2)(a).

## **Maintaining Financial Records**

Surf's Up Cannabis Ventures', LLC ("SU") policy is to maintain financial records in accordance with 935 CMR 500.105(9)(e). The records will include manual or computerized records of assets and liabilities, monetary transactions; books of accounts, which shall include journals, ledgers, and supporting documents, agreements, checks, invoices and vouchers; sales records including the quantity, form, and cost of marijuana products; and salary and wages paid to each employee, stipends paid to each board member, and any executive compensation, bonus, benefit, or item of value paid to any individual affiliated with a Marijuana Establishment, including members of the non-profit corporation.

SU will conduct monthly sales equipment and data software checks and initiate reporting requirements for discovery of software manipulation as required by 935 CMR 500.140(5)(d). SU will not utilize software or other methods to manipulate or alter sales data in compliance with 935CMR 500.140(5)(c).

SU will conduct a monthly analysis of its equipment and sales data to determine that no software has been installed that could be utilized to manipulate or alter sales data and that no other methodology has been employed to manipulate or alter sales data. SU will maintain records that it has performed the monthly analysis and produce it upon request to the Commission. If SU determines that software had been installed for the purpose of manipulation or alteration of sales data or other methods have been utilized to manipulate or alter sales data we will: disclose the information to the Commission; cooperate with the Commission in an investigation relative to data manipulation; and take other action as directed by the Commission to comply with the applicable regulations. Pursuant to 935 CMR 500.140(5)(e), SU will comply with 830 CMR 62C.25.1: Record Retention and DOR Directive 16-1 regarding recordkeeping requirements.

SU financial records will be available for inspection by the Commission, upon request. The financial records will be maintained in accordance with generally accepted accounting principles. Following the closure of SU, all records will be kept for at least two years at the expense of SU and in a form and location acceptable to the Commission, in accordance with 935 CMR 500.105(9)(g). Financial records shall be kept for a minimum of three years from the date of the filed tax return, in accordance with 830 CMR 62C.25.1(7) and 935 CMR 500.140(5)(e).

## **Record Keeping Procedure**

Surf's Up Cannabis Ventures', LLC, ("SU") records will be available to the Cannabis Control Commission ("CCC") upon request pursuant to 935 CMR 500.105(9). The records will be maintained in accordance with generally accepted accounting principles. All written records required in any section of 935 CMR 500.000 are subject to inspection, in addition to written operating procedures as required by 935 CMR 500.105(1), inventory records as required by 935 CMR 500.105(8) and seed-to-sale tracking records for all marijuana products are required by 935 CMR 500.105(8)(e).

SU will also keep all waste disposal records as required by 500.105(12), including record keeping procedures. SU will ensure that at least 2 Marijuana Establishment Agents witness and document how the marijuana waste is disposed of or otherwise handled in accordance with 935 CMR 500.105(12). When the marijuana products or waste is disposed or handled, SU will create and maintain a written or electronic record of the date, the type, and quantity disposed or handled, the manner of disposal or other handling, the location of the disposal or other handling, and the names of the Agents present during the disposal or handling, with their signatures. SU will keep these records for at least 3 years.

Personnel records will also be maintained, in accordance with 935 CMR 500.105(9)(d), including but not limited to, job descriptions for each employee, organizational charts, staffing plans, personnel policies and procedures, and background checks obtained in accordance with 935 CMR 500.030. Personnel records will be maintained for at least 12 months after termination of the individual's affiliation with SU, in accordance with 935 CMR 500.105(9)(d)(2). Additionally, business will be maintained in accordance with 935 CMR 500.104(9)(e) as well as waste disposal records pursuant to 935 CMR 500.104(9)(f), as required under 935 CMR 500.105(12).

Following the closure of the Marijuana Establishment, all records will be kept for at least two years at the expense of SU and in a form and location acceptable to the Commission, pursuant to 935 CMR 500.105(9)(g). In accordance with 935 CMR 500.105(9), records of SU will be available for inspection by the Commission upon request. SU's records will be maintained in accordance with generally accepted accounting principle and will have all required written records and available for inspection, including all written operating procedures as required by 935 CMR 500.105(1) and business records as outlined by 935 CMR 500.105(9)(e).

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## **Qualifications and Training**

Pursuant to 935 CMR 500.105(2)(a) Surf's Up Cannabis Ventures LLC ("SU") will ensure all dispensary agents complete training prior to performing job functions. Training will be tailored to the role and responsibilities of the job function. Dispensary agents will be trained for one week before acting as a dispensary agent. At a minimum, staff shall receive eight hours of on-going training annually. New dispensary agents will receive employee orientation prior to beginning work with SU. Each department manager will provide orientation for dispensary agents assigned to their department. Orientation will include a summary overview of all the training modules.

In accordance with 935 CMR 500.105(2), all current owners, managers and employees of SU that are involved in the handling and sale of marijuana will successfully complete Responsible Vendor Training Program, and once designated a "responsible vendor," require all new employees involved in handling and sale of marijuana to complete this program within 90 days of hire. This program shall then be completed annually and those not selling or handling marijuana may participate voluntarily. SU will maintain records of responsible vendor training compliance, pursuant to 935 CMR 500.105(2)(b). Responsible vendor training shall include: discussion concerning marijuana effect on the human body; diversion prevention; compliance with tracking requirements; identifying acceptable forms of ID, and key state and local laws.

All employees will be registered as agents, in accordance with 935 CMR 500.030. All SU employees will be duly registered as marijuana establishment agents and have to complete a background check in accordance with 935 CMR 500.030(1). All registered agents of SU shall meet suitability standards of 935 CMR 500.800.

Training will be recorded and retained in the dispensary agents file. Training records will be retained by SU for at least one year after agents' termination. Dispensary agents will have continuous quality training and a minimum of 8 hours annual on-going training.



## **Energy Compliance Plan**

At all times, Surf's Up Cannabis Ventures, LLC ("SU") Marijuana Establishment will satisfy minimum energy efficiency and conservation standards as required by the Commission and in accordance with 935 CMR 500.105(15).

SU will strive to reduce energy demand, including but not limited to, the following:

- Use of natural lighting where feasible and compliant with CCC regulations;
- Insulate walls and the ceiling to meet or exceed the Energy Code for commercial buildings.
- Purchase and installation of LED lights, where feasible;
- Utilization of advanced and energy efficient HVAC systems;
- Energy efficient cooling tower;
- Hot water tank with hybrid design to enhance overall energy efficiency;
- Insulated glazing;
- Strategies to reduce electric demand (such as lighting schedules, active load management, and energy storage).
- New building insulation, where feasible.

The project will be in compliance with the International Building Code's requirements for sustainable and energy conservation. SU will work closely with the utility to create and execute an energy savings plan, including:

- Understanding of how we consume energy through analysis generation;
- Compare our operation with similar businesses and act accordingly;
- Solicit customized energy improvement recommendations from professionals and
- Determine how and if such recommendations can be incorporated into our business plan; and
- Identify cost incentives through utility energy programs, such as Mass Save programs to explore financial incentives for energy efficiency and demand reduction measures.

## **Restricting Access to Age 21 and Older**

### **I. Intent**

Surf's Up Cannabis Ventures LLC ("SU") will be compliant with all regulations outlined in 935 CMR 500.000 et. seq. ("the Regulations") and any other requirements or sub-regulatory guidance issued by the Massachusetts Cannabis Control Commission ("CNB") or any other regulatory agency.

### **II. Purpose**

The purpose of this policy is to outline the responsibilities of the Company, the Company's management team and Agents to ensure specific, methodical, and consistent compliance of the Regulations and to ensure that access to our facility is restricted to only persons who are 21 years of age or older.

### **III. Definitions**

**Consumer** means a person who is 21 years of age or older.

**Law Enforcement Authorities** means local law enforcement unless otherwise indicated.

**Marijuana Establishment Agent** means a board member, director, employee, executive, manager, or volunteer of a Marijuana Establishment, who is **21 years of age or older**. Employee includes a consultant or contractor who provides on-site services to a Marijuana Establishment related to the cultivation, harvesting, preparation, packaging, storage, testing, or dispensing of marijuana.

**Proof of Identification** means a government issued photograph that contains the name, date of birth, physical description and signature of the individual and is currently valid (in other words, not expired). SU will only accept the following forms of proof of identification that include all of the above criteria;

1. Massachusetts driver's license
2. Massachusetts Issued ID card
3. Out-of-state driver's license or ID card
4. Government issued Passport
5. U.S. Military I.D.

**Visitor** means an individual, other than a Marijuana Establishment Agent authorized by the Marijuana Establishment, on the premises of an establishment for a purpose related to its operations and consistent with the objectives of St. 2016, c. 334, as amended by St. 2017, c. 55

and 935 CMR 500.000, provided, however, that **no such individual shall be younger than 21 years old.**

#### **IV. Responsibilities**

SU's team is responsible for ensuring that all persons who enter the facility or are otherwise associated with the operations of SU are 21 years of age or older.

#### **V. Access to the Facility**

SU's facility located 770 Gallivan Boulevard, Dorchester, allows only the following individuals access to our facility. For the purposes of this Policy the term facility also refers to any vehicle owned, leased, rented, or otherwise used by SU for the transportation of Marijuana:

1. SU employees and agents (including board members, directors, employees, executives, managers, or volunteers)
  - While at the facility or transporting marijuana for the facility all SU Agents must carry their valid Agent Registration Card issued by the Commission
  - All SU Agents are verified to be 21 years of age or older prior to being issued a Marijuana Establishment Agent card.
2. Customers/Consumers (Note: All Agents will be trained in the Verification and Identification of individuals)
  - To verify a customer is 21 or older, a SU Agent must receive and examine from the customer one of the following authorized government issued ID Cards;
    1. Massachusetts Issued driver's license
    2. Massachusetts Issued ID card
    3. Out-of-state driver's license or ID card (with photo)
    4. Passport
    5. U.S. Military I.D.
  - In the event that the ID is not a scannable ID, or if for any reason the scanner is not operational or available or if the ID is questionable the Agent must use the **FLAG** methodology of ID verification
    - i. **F. Feel**
      1. Have the customer remove the ID from their wallet or plastic holder (never accept a laminated document)
      2. Feel for information cut-out or pasted on (especially near photo and birth date areas)
      3. Feel the texture – most driver's license should feel smooth, or (depending on your State) they will have an identifying texture
    - ii. **L. Look**

3. Visitors

(including outside vendors and contractors)

1. Look for the State seals or water marks; these seals are highly visible without any special light.
2. Look at the photograph. Hairstyles, eye makeup and eye color can be altered, so focus your attention on the person's nose and chin as these features don't change. When encountering people with beards or facial hair, cover the facial hair portion of the photo and concentrate on the nose or ears.
3. Look at the height and weight. They should reasonably match the person.
4. Look at the date of birth and do the math!
5. Compare the age on the ID with the person's apparent age.
6. Look at the expiration date. If the ID has expired, it is not acceptable.
7. If needed, compare the ID to the book of Government Issued IDs

iii. A. Ask

1. Ask questions of the person, such as their middle name, zodiac sign, or year of high school graduation. Ask them the month they were born. If they respond with a number, they may be lying. If the person is with a companion, ask the companion to quickly tell you the person's name.
2. If you have questions as to their identity, ask the person to sign their name, and then compare signatures.

iv. G. Give Back

1. If the ID looks genuine, give the ID back to the customer and allow entry.

d. If for any reason the identity of the customer or the validity of the ID is in question, do not allow the customer to enter the facility.

a. Prior to being allowed access to the facility or any Limited Access Area, the visitor must produce a Government issued Identification Card to a member of the management team and have their age verified to be 21 years of age or older.

i. If there is any question as to the visitor's age, or if the visitor cannot produce a Government Issued Identification Card, they will not be granted access.

- After the age of the visitor is verified they will be given a Visitor Identification Badge
- Visitors will be escorted at all times by a marijuana establishment agent authorized to enter the limited access area.
- Visitors will be logged in and out of the facility and must return the Visitor Identification Badge upon exit.

i. The visitor log will be available for inspection by the Commission at all times

#### 4. Access to the Commission, Emergency Responders and Law Enforcement.

- The following individuals shall have access to a Marijuana Establishment or Marijuana Establishment transportation vehicle:
  - i. Representatives of the Commission in the course of responsibilities authorized by St. 2016, c. 334, as amended by St. 2017, c. 55 or 935 CMR 500.000;
  - ii. Representatives of other state agencies of the Commonwealth; and
  - iii. Emergency responders in the course of responding to an emergency.
  - iv. Law enforcement personnel or local public health, inspectional services, or other permit-granting agents acting within their lawful jurisdiction.
- Individuals described above in this policy will be granted immediate access to the facility.

#### **VI. Training**

SU will train all Agents on the verification and identification of individuals. This training will be done prior to Agents performing age verification duties. Management will supply Age Verification Smart ID Scanners and hardcover books to assist Agents in age verification.

All SU agents will enroll and complete the Responsible Vendor Training Program when it is available. This curriculum will include:

- Diversion prevention and prevention of sales to minors;
- Acceptable forms of identification, including:
  - i. How to check identification;
  - ii. Spotting false identification;
  - iii. Medical registration cards issued by the DPH;
  - iv. Provisions for confiscating fraudulent identifications; and
  - v. Common mistakes made in verification.



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## **Diversity Plan**

### **I. Intent**

Surf's Up Cannabis Ventures, LLC ("SU") is committed to creating a diverse workforce by utilizing hiring practices that do not discriminate against women, people of color, particularly Black; African American; Hispanic; Latinx; and indigenous peoples, veterans, persons with disabilities, and LGBTQIA+ individuals. Furthermore, it is our belief that the more diverse and inclusive our team is, the more successful SU will be in Massachusetts as we seek to utilize ideas and innovations from a variety of backgrounds, experiences, and cultures.

### **II. Purpose**

SU's Diversity Plan has been created to ensure that our hiring practices create a diverse and inclusive organization. In doing so, individuals will be able to apply their life experiences and talents to support the goals of the company.

SU's Diversity Plan is meant to be an evolving document designed to guide decisions and practices that ensure we are able to reach our goals described below. The Diversity Plan represents an initial approach to establish a comprehensive management plan with goals and measures for inclusion and diversity. The Diversity Plan will be evaluated and modified, when necessary, as our company grows and expands.

Any actions taken, or programs instituted, by SU will not violate the Cannabis Control Commission's regulations with respect to limitations on ownership or control or other applicable state laws or regulations.

### **III. Proposed Initiatives, Goals and Metrics**

**GOAL 1:** Recruit and hire a diverse group of employees that values and promotes inclusiveness among the workforce.

Proposed Initiative: As part of its hiring plan, SU will seek to hire a workforce that is made up

of at least 50% women and 25% described as minorities, 10% veterans, people with 5% disabilities, and 10% LGBTQ+ individuals with a goal to increase the number of individuals falling into these demographics working in the establishment. Hiring opportunities will be posted and circulated in a local newspaper at least once a month or as needed to fulfill the company's hiring needs. To achieve this goal, SU will:

- Create gender-neutral job descriptions;
- Post hiring needs in a variety of web-based recruitment platforms such as indeed.com;
- Attend community group meetings in and around Boston, at least two annually, to introduce SU and address our existing hiring needs to attract a diverse array of individuals, with an emphasis on those affiliated with the cannabis industry and;
- Utilize the Massachusetts Supplier Diversity Office, local job boards, and other available resources to find and prioritize the engagement of qualified persons, suppliers, and vendors that are majority owned and operated by diverse individuals.

SU will adhere to the requirements set forth in 935 CMR 500.105(4) relative to the permitted and prohibited advertising, brand, marketing, and sponsorship practices of marijuana establishments. SU will engage with community groups and leaders to further identify ways in which to attract candidates that may not otherwise be aware of employment opportunities with SU. To ensure that our workplace is an inclusive environment and to promote equity among our team, all hiring managers will undergo training to address bias and cultural sensitivity.

*Metrics and Evaluation:* SU will assess the demographics of its employees to see if it is meeting its goal of increasing diversity in these positions. SU will annually analyze the staffing makeup and based upon the outcome of those analytics, determine what steps are necessary to further increase the diversity of SU. SU will document the number of employment opportunities posted by local papers. SU will also document the number of diverse suppliers and vendors contracted for services or products. SU will assess and review its progress within a year of receiving its Final License from the Cannabis Control Commission for an adult-use marijuana establishment and then annually, thereafter. Based upon this annual review and in conjunction with the renewal of its license, SU will be able to demonstrate to the Commission the success of this initiative. The progress or success will be documented one year from provisional licensure.

**GOAL 2:** Ensure that participants in our supply chain and ancillary services are committed to the same goals of promoting equity and diversity in the adult-use marijuana industry. SU's goal will be to achieve 25% of our supply chain and ancillary services are owned and/or employ diverse demographics.

*Proposed Initiative:* To accomplish this goal, SU will prioritize working with businesses in our supply chain and required ancillary services that are owned and/or managed by minority groups; 5% women, 5% minorities, 5% veterans, 5% people with disabilities, and 5% LGBTQ+ individuals. (Herein referred to as Plan Populations).

*Metrics and Evaluation:* SU will measure how many of its ancillary services and participants in its supply chain are owned and/or managed by Plan Populations and will calculate the percentage

of services and members of its supply chain who meet this requirement. SU will ask suppliers and ancillary services if they would identify themselves as a business that is owned or managed by one of the Plan Populations and give supplier contractor priority to these businesses. In order to target a diverse supplier base, SU will post hiring needs in diverse publications such as a variety of web-based recruitment platforms such as indeed.com and attend community group meetings, at least two annually, to introduce SU and address the existing hiring needs to attract a diverse array of suppliers. SU will adhere to the requirements set forth in 935 CMR 500.105(4) relative to the permitted and prohibited advertising, brand, marketing, and sponsorship practices of marijuana establishments. During its engagement with community groups and leaders referenced in Goal 1, SU will further identify ways in which to attract diverse supply chain candidates that may not otherwise be aware of employment opportunities with SU. SU's goal will be to work with at least 25% of businesses who identify as one of the Plan Populations throughout its supply chain and services. SU will work to contract with diverse businesses for the purchase of wholesale marijuana product and the provision of other services required for the operation and maintenance of the Company's marijuana establishment, with the following specific goals: 5% women, 5% minorities, 5% veterans, 5% people with disabilities, and 5% LGBTQIA+ individuals.

SU will assess these percentages annually and will be able to demonstrate and document to the Commission the progress or success will be documented one year from provisional licensure.

#### **IV. Conclusion**

SU will conduct continuous and regular evaluations of the implementation of its goals and at any point will retool its policies and procedures in order to better accomplish the goals set out in this Diversity Plan. Any actions taken, or programs instituted by SU will not violate the Commission's regulations with respect to limitations on ownership or control or other applicable state laws.

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## **Diversity Plan RFI Findings**

The following findings identified below have been included in the updated Diversity Summary uploaded.

- RFI Finding 1: The plan is tailored only to Commission-approved areas of diversity
  - Included in paragraph 1, line 2.
- RFI Finding 2: The establishment's proposed programs should detail the ways in which it will effectuate the listed goal, which should include the frequency, duration, and state which outreach methods were used to recruit the specific targeted populations for each program.
  - Included in Goal 1, Paragraph 2
  - Included in Goal 1, Metrics, line 4
  - Included in Goal 2, Metrics, line 15



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