



# Massachusetts Cannabis Control Commission

## Public Record Request

### Marijuana Product Manufacturer

#### General Information:

License Number: MP281590

Original Issued Date: N/A

Issued Date: N/A

Expiration Date: N/A

Payment Received: \$0      Payment Required: \$5000

### ABOUT THE MARIJUANA ESTABLISHMENT

Business Legal Name: Tree Beard Inc.

Phone Number: 774-722-3387      Email Address: treebeardinc@gmail.com

Business Address 1: 319A Union St	Business Address 2:
Business City: New Bedford      Business State: MA	Business Zip Code: 02740
Mailing Address 1: 319A Union St	Mailing Address 2:
Mailing City: New Bedford      Mailing State: MA	Mailing Zip Code: 02740

### CERTIFIED DISADVANTAGED BUSINESS ENTERPRISES (DBES)

Certified Disadvantaged Business Enterprises (DBEs): Not a DBE

### PRIORITY APPLICANT

Priority Applicant: yes

Priority Applicant Type: Economic Empowerment Priority

Economic Empowerment Applicant Certification Number: EE202151

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: 18      Percentage Of Control: 18

Role: Executive / Officer      Other Role: CEO

First Name: Jeffrey      Last Name: Pepi      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:

#### Person with Direct or Indirect Authority 2

Percentage Of Ownership: 15      Percentage Of Control: 15

Role: Executive / Officer      Other Role: COO

First Name: Job      Last Name: Roach      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:

#### Person with Direct or Indirect Authority 3

Percentage Of Ownership: 1      Percentage Of Control:

Role: Director      Other Role:

First Name: Leona      Last Name: Leaver      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 4

Percentage Of Ownership: 1      Percentage Of Control:

Role: Director      Other Role:

First Name: Daphney      Last Name: Williams      Suffix:

Gender: Female      User Defined Gender:

What is this person's race or ethnicity?: Black or African American (of African Descent, African American, Nigerian, Jamaican, Ethiopian, Haitian, Somali)

Specify Race or Ethnicity:

#### Person with Direct or Indirect Authority 5

Percentage Of Ownership: 15      Percentage Of Control: 15

Role: Executive / Officer      Other Role: CLO

First Name: Nicholas      Last Name: Gomes      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:

#### Person with Direct or Indirect Authority 6

Percentage Of Ownership: 15      Percentage Of Control: 15

Role: Executive / Officer      Other Role: Director of Production

First Name: Joshua      Last Name: Craig      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:	

Person with Direct or Indirect Authority 7

Percentage Of Ownership: 17	Percentage Of Control: 17	
Role: Executive / Officer	Other Role: CMO	
First Name: Hans	Last Name: Doherty	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:		

Person with Direct or Indirect Authority 8

Percentage Of Ownership: 17	Percentage Of Control: 17	
Role: Executive / Officer	Other Role: CTO	
First Name: Christopher	Last Name: Thistle	Suffix:
Gender: Male	User Defined Gender:	
What is this person's race or ethnicity?: Middle Eastern or North African (Lebanese, Iranian, Egyptian, Syrian, Moroccan, Algerian)		
Specify Race or Ethnicity:		

Person with Direct or Indirect Authority 9

Percentage Of Ownership: 1	Percentage Of Control: 1	
Role: Owner / Partner	Other Role:	
First Name: Kathleen	Last Name: Pallatroni	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:		

ENTITIES WITH DIRECT OR INDIRECT AUTHORITY

No records found

CLOSE ASSOCIATES AND MEMBERS

No records found

CAPITAL RESOURCES - INDIVIDUALS

No records found

CAPITAL RESOURCES - ENTITIES

Entity Contributing Capital 1

Entity Legal Name: Tree Beard Inc.	Entity DBA:		
Email: treebeardinc@gmail.com	Phone: 774-722-3387		
Address 1: 319a Union Street	Address 2:		
City: New Bedford	State: MA	Zip Code: 02740	
Types of Capital: Monetary/Equity	Other Type of Capital:	Total Value of Capital Provided: \$50000	Percentage of Initial Capital: 100
Capital Attestation: Yes			

### BUSINESS INTERESTS IN OTHER STATES OR COUNTRIES

No records found

### DISCLOSURE OF INDIVIDUAL INTERESTS

No records found

### MARIJUANA ESTABLISHMENT PROPERTY DETAILS

Establishment Address 1: 1 Nauset Street

Establishment Address 2:

Establishment City: New Bedford

Establishment Zip Code: 02746

Approximate square footage of the Establishment: 8700

How many abutters does this property have?: 21

Have all property abutters have 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
Certification of Host Community Agreement	Host Only Final 10-3-19.PDF	pdf	5dacade073225f2fcd764c05	10/20/2019
Community Outreach Meeting Documentation	community outreach-6.pdf	pdf	5dacadfa6b4e192b1d271859	10/20/2019
Community Outreach Meeting Documentation	community outreach-7.pdf	pdf	5dacadfb0724b82ff99cd8fc	10/20/2019
Community Outreach Meeting Documentation	community outreach-8.pdf	pdf	5dacadfcba9d562b3e030c95	10/20/2019
Community Outreach Meeting Documentation	community outreach-5.pdf	pdf	5dacadfeb35b62300f5d818a	10/20/2019
Community Outreach Meeting Documentation	community outreach-3.pdf	pdf	5dacae1290352a2b339ac8a5	10/20/2019
Community Outreach Meeting Documentation	community outreach-4.pdf	pdf	5dacae1473225f2fcd764c09	10/20/2019
Community Outreach Meeting Documentation	community outreach-1.pdf	pdf	5dacae15cdbfc22fc658c0a5	10/20/2019
Community Outreach Meeting Documentation	community outreach-2.pdf	pdf	5dacae16e3decf2b0b0d3313	10/20/2019
Plan to Remain Compliant with Local Zoning	Zoning Compliance.PDF	pdf	5dacaead5c8962b282da81d	10/20/2019

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.: \$

### PLAN FOR POSITIVE IMPACT

Plan to Positively Impact Areas of Disproportionate Impact:

Document Category	Document Name	Type	ID	Upload Date
Other	ICPA Positive Impact2.PDF	pdf	5de7e069170b4c5353e3d25e	12/04/2019
Other	ICPA Positive Impact.PDF	pdf	5de7e06b160e3b57a3dd535a	12/04/2019
Plan for Positive Impact	Positive Impact Plan.pdf	pdf	5de7e2469c1081532b9a84a5	12/04/2019

### ADDITIONAL INFORMATION NOTIFICATION

Notification: I Understand

### INDIVIDUAL BACKGROUND INFORMATION

Individual Background Information 1

Role: Owner / Partner

Other Role: Board Member

**First Name:** Jeffrey **Last Name:** Pepi **Suffix:**

**RMD Association:** Not associated with an RMD

**Background Question:** yes

#### Individual Background Information 2

**Role:** Owner / Partner **Other Role:** Board Member

**First Name:** Job **Last Name:** Roach **Suffix:**

**RMD Association:** Not associated with an RMD

**Background Question:** no

#### Individual Background Information 3

**Role:** Owner / Partner **Other Role:** Board Member

**First Name:** Christopher **Last Name:** Thistle **Suffix:**

**RMD Association:** Not associated with an RMD

**Background Question:** yes

#### Individual Background Information 4

**Role:** Owner / Partner **Other Role:** Board Member

**First Name:** Hans **Last Name:** Doherty **Suffix:**

**RMD Association:** Not associated with an RMD

**Background Question:** no

#### Individual Background Information 5

**Role:** Owner / Partner **Other Role:** Board Member

**First Name:** Joshua **Last Name:** Craig **Suffix:**

**RMD Association:** Not associated with an RMD

**Background Question:** no

#### Individual Background Information 6

**Role:** Owner / Partner **Other Role:** Board Member

**First Name:** Nicholas **Last Name:** Gomes **Suffix:**

**RMD Association:** Not associated with an RMD

**Background Question:** yes

#### Individual Background Information 7

**Role:** Owner / Partner **Other Role:**

**First Name:** Leona **Last Name:** Leaver **Suffix:**

**RMD Association:** Not associated with an RMD

**Background Question:** no

#### Individual Background Information 8

**Role:** Owner / Partner **Other Role:**

**First Name:** Daphney **Last Name:** Williams **Suffix:**

**RMD Association:** Not associated with an RMD

**Background Question:** no

#### Individual Background Information 9

Date generated: 09/29/2020

Role: Owner / Partner

Other Role:

First Name: Kathleen

Last Name: Pallatroni    Suffix:

RMD Association: Not associated with an RMD

Background Question: no

#### ENTITY BACKGROUND CHECK INFORMATION

No records found

#### MASSACHUSETTS BUSINESS REGISTRATION

Required Business Documentation:

Document Category	Document Name	Type	ID	Upload Date
Department of Revenue - Certificate of Good standing	Certificate of Good Standing DOR.pdf	pdf	5db72121b35b62300f5d991f	10/28/2019
Bylaws	Tree Beard Bylaws 2-8-19.PDF	pdf	5de7dcca66a32657cfbdde72	12/04/2019
Articles of Organization	Tree Beard Articles of Inc. 11-22-19.aspx.pdf	pdf	5de7dcea40e348579197f804	12/04/2019

No documents uploaded

Massachusetts Business Identification Number: 001271344

Doing-Business-As Name: Tree Beard Inc.

DBA Registration City: New Bedford

#### BUSINESS PLAN

Business Plan Documentation:

Document Category	Document Name	Type	ID	Upload Date
Proposed Timeline	Tree Beard timeline 10-16-19.pdf	pdf	5db7219273225f2fcd76637c	10/28/2019
Plan for Liability Insurance	Insurance Quote 10-26-19.pdf	pdf	5de7dd929c1081532b9a8482	12/04/2019
Business Plan	Tree Beard Inc Business Plan.CCC 11-25-19.pdf	pdf	5de7de12d5b0805341c64f60	12/04/2019

#### OPERATING POLICIES AND PROCEDURES

Policies and Procedures Documentation:

Document Category	Document Name	Type	ID	Upload Date
Inventory procedures	Inventory Procedures.pdf	pdf	5cd08d8a746cd40f5f705544	05/06/2019
Record Keeping procedures	Record Keeping.pdf	pdf	5cd08dbe1e17b90a620c7ea8	05/06/2019
Storage of marijuana	Storage Procedures.pdf	pdf	5cd08de5ecfaea0f8793d79e	05/06/2019
Security plan	Security Procedures.pdf	pdf	5daciaa75572d3130006a3478	10/20/2019
Method used to produce products	Method used to produce products 2nd form.pdf	pdf	5db8a22ec9aebd2b498aa3ad	10/29/2019
Personnel policies including background checks	Personnel Policies.pdf	pdf	5db8ac374b00122fe399ff41	10/29/2019

Transportation of marijuana	Transportation Plan.pdf	pdf	5de7de59160e3b57a3dd533c	12/04/2019
Restricting Access to age 21 and older	Restricted Access Under 21.pdf	pdf	5de7de7040e348579197f80e	12/04/2019
Prevention of diversion	Prevention of Diversion.pdf	pdf	5de7deb026aa77532085e516	12/04/2019
Quality control and testing	Quality Control Testing Procedures.pdf	pdf	5de7dee726aa77532085e51b	12/04/2019
Sample of unique identifying marks used for branding	OSG.PNG	png	5de7f7b340e348579197f8a2	12/04/2019
Sample of unique identifying marks used for branding	Unique Identifying Marks.pdf	pdf	5de9236040e348579197fb1b	12/05/2019
Qualifications and training	Qualifications and Intended Training for Agents.pdf	pdf	5de93cda8bdcfd57ae528f17	12/05/2019
Maintaining of financial records	Maintaining Financial Records.pdf	pdf	5de93d3da9ef3857c445cb4a	12/05/2019
Diversity plan	Diversity Plan.pdf	pdf	5df2c48aef24345344e4d338	12/12/2019
Diversity plan	ICPA Diversity (1).PDF	pdf	5df2c48b38abaf57497a9046	12/12/2019
Types of products Manufactured.	Manufacturing Specific Procedures.pdf	pdf	5df3f628fe65bd57507002a3	12/13/2019

#### 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 Understand

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: I Understand

#### COMPLIANCE WITH POSITIVE IMPACT PLAN

No records found

#### COMPLIANCE WITH DIVERSITY PLAN

No records found

#### PRODUCT MANUFACTURER SPECIFIC REQUIREMENTS

No records found

#### HOURS OF OPERATION

<b>Monday From:</b> Open 24 Hours	<b>Monday To:</b> Open 24 Hours
<b>Tuesday From:</b> Open 24 Hours	<b>Tuesday To:</b> Open 24 Hours
<b>Wednesday From:</b> Open 24 Hours	<b>Wednesday To:</b> Open 24 Hours
<b>Thursday From:</b> Open 24 Hours	<b>Thursday To:</b> Open 24 Hours
<b>Friday From:</b> Open 24 Hours	<b>Friday To:</b> Open 24 Hours
<b>Saturday From:</b> Open 24 Hours	<b>Saturday To:</b> Open 24 Hours
<b>Sunday From:</b> Open 24 Hours	<b>Sunday To:</b> Open 24 Hours



# **Tree Beard Inc., Group of Companies**

Business Plan for a Massachusetts Recreational Marijuana Establishment  
under 935 CMR 500.00 and ancillary businesses as of January 25, 2019

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## **I. Summary**

This Business Plan is for the operation of Tree Beard, Inc., as a future licensed recreational marijuana establishment for cannabis cultivation, manufacture, retail sale, and transportation upon the issuance of the appropriate licenses from the Cannabis Control Commission (CCC). This plan summarizes our best practices to minimize any potential harms associated with this business as well as maximize potential benefits for the New Bedford community. Through our economic empowerment and social responsibility initiatives we plan to rejuvenate our city that has been so harshly affected by the disproportionate impact of the criminalization of cannabis.

Tree Beard, Inc., comprises of executive officers, board members and close affiliates with particularized skills including extensive knowledge of the local New Bedford area and cannabis industry, legal compliance, real estate investment, insurance, finance, medical, marketing, cannabis cultivation and manufacturing, construction, information technology, retail sales, and existing client relations and networks. Tree Beard intends to initially obtain one of each available license to allow for vertical integration of products from seed to sale in one location and then seek expansion to new locations. Utilizing one location for the first set of licenses will allow us to be the first to market in our area, maximize profits from selling our own products, and minimize risks associated with transporting products between the license types and operating several locations at once.

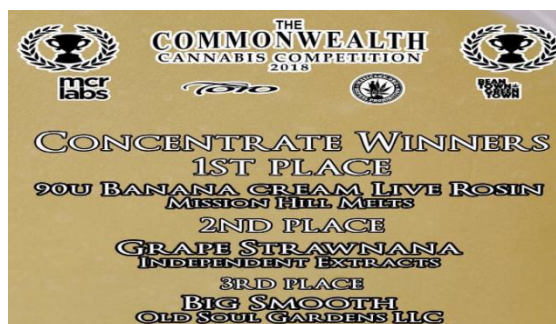
As a certified economic licensee, we intend to prioritize our progressive company policies, community improvements, and employee base of New Bedford residents. Tree Beard intends to lead the state as a shining example of corporate responsibility through our diverse hiring practices and allocating 3% of our gross funds to the City of New Bedford and 1.5% for local programs that deliver substance abuse prevention and education in the City's elementary and secondary school. We believe in correcting the social economic in-justice through the opportunity of providing quality local grown cannabis. Tree Beard is potentially going to be the first locally owned vertically integrated cannabis establishment in a distressed gateway city.

## II. Site Control: 1 Nauset Street, New Bedford, Massachusetts



Tree Beard currently has site control over one of the few parcels in the City of New Bedford that meets their zoning ordinance. Phase one is obtaining licensing and permitting for the first set of licenses to perform complete vertical integration of cannabis cultivation, manufacture, transportation, and retail sale of cannabis at 1 Nauset Street, New Bedford, Massachusetts. Phase one vertical integration is required for brand viability in an unprecedented market in Massachusetts with a narrow selection of available properties. Phase one allows for a self-sustaining, efficient, safe, and economic start of the company. 1 Nauset Street is an existing car dealership consisting of 8,900 square feet on a .82 acre lot zoned for industrial use in compliance with the City's Zoning Ordinance for a Marijuana Establishment. Nauset Street is highly desirable because of its zoning compliance, existing showroom and garage, large parking lot for customers and employees, two electric vehicle charging stations, and close proximity to transportation nodes including the Mt. Pleasant/Nauset Street Bus Stop (SRTA), Route 140, and Interstate I95. Tree Beard, Inc., will be the first recreational dispensary in New Bedford and will be a model of how cannabis can properly fit into society while adding societal benefit and minimizing the dangers associated with the industry.

### III. Group of Companies



Tree Beard’s cultivation, manufacture, and retail license will be under the trade name **Old Soul Gardens**. Old Soul Gardens is an award winning independent craft cannabis company discreetly styled to provide secure and safe access to only the highest quality cannabis flower from our very own proprietary strains and the highest quality hand-crafted cannabis products including flower, kief, hash, concentrates, edible infusions, custom handrolls, oils and topicals. OSG will be the premier craft cannabis company known for its “never settle approach in crafting high-quality products and promoting a remarkably distinct **“lifted life®”** for our clients.” Our mantra establishes our commitment to providing our clients with the highest quality of cannabis products to attain wellness on all levels they may seek. Old Soul Gardens will strive to grow and manufacture cannabis products of the highest quality to then be dispensed at several of our own uniquely branded retail stores and possibly wholesale to third party retail establishments. Tree Beard intends to capture the broadest market of individuals by creating distinct retail establishments to appeal to everyone’s unique interests. Old Soul Gardens’ craft vibe will attract the existing recreational cannabis consumer, cannabis connoisseurs seeking high-quality hand-crafted products, and a new market of potential cannabis consumers interested in the offering of OSG as a new “modern classic.”

Tree Beard’s transportation license was first presented to Senator Pat Jehlin and the cannabis council in April 2017, as a safe means for patients to obtain reliable access to safe and quality cannabis. The transportation license is proudly held by 51% women ownership and operated by two amazing women who have qualification under the “Women-Owned Small Business Federal Contract Program in the Equity in Contracting for Women Act of 2000.”

Women comprise 51 percent of the US population and 47 percent of the total US labor force. Unfortunately, the reality is barriers remain despite legal protections against gender discrimination

and equal opportunity employment. Women on average make 20% less than men. Tree Beard is changing the game leaving behind these outdated views and establishing women as their own boss in the new cannabis market of Massachusetts. This blooming market is a perfect opportunity to narrow the gender gap in business ownership.

In light of these disparities around ownership, women, and their advocates, have worked compete fairly and succeed. One of the most powerful tools for getting that support has come from a national program of women-owned business certification. Tree Beard will be the state's first cannabis exchange owned by a majority of women.

#### **IV. Executives:**

Daphne Bossicot Williams currently owns and operates successful medical transportation services in Massachusetts and Rhode Island with twelve vehicles to facilitate transitioning into the cannabis industry. Daphney Williams's parents came to this country from Haiti when she was 9. She learned a deep respect for the need of safety from her father who was in the security industry. This mindset allowed her to create, New Generation Transportation as well as qualify for the "Women-Owned Small Business Federal Contract Program." As a board member of the RI Non-emergency Medical Transportation Association, she has fought for the elderly population at the state level. Her goal has always been to ensure quality service from experienced, qualified, and properly trained drivers. Her existing transportation company already implements security and safety protocols for elderly patients. Daphne's other passion is serving on the board of the Wickford SDA Church as well as helping young children in the Pathfinder program.

Leona Leaver, Managing Director, has successfully owned LL Medical Transportation for the past 4 years with one of the highest customer service ratings. She has spent a lot of her time assisting the community with her work at The Humane Society rescuing kittens and pets. Leona was a pedestrian who was hit by a car some years ago and left with a T12 spinal cord injury. After being forced to take disability benefits she thought working again, never mind owning a business, was out of reach. After a long recovery, she took the very little money she had and 30 yrs. of knowledge in para-transit to start her own transportation business. Leona's perseverance and rigid work ethic allowed her to return to the work force and she is now flourishing.

The Tree Beard Group of Companies consists of six original officers and owners. Jeffrey Pepi is the original founder of the Tree Beard concept of companies. Jeffrey Pepi has successfully owned an insurance company since 1998. Jeff diversified his company to specialize in health insurance under a new company, Health Plan Solutions, which assisted businesses staying legally

compliance with Massachusetts' Fair Share Contributions. The company evolved to assist patients navigate the arduous task of completing Mass Health & Connector Care enrollments. Tree Beard was realized when medical marijuana became legal in Massachusetts and Jeff saw an opportunity to continue his passion for helping people.

Joshua R. Craig is the founder of the Old Soul Gardens brand and is a master cannabis cultivator. Joshua has over ten years' experience with cultivation of cannabis including lead-management of large-scale operations out-of-state and strain development. Joshua maintains over 20 proprietary strains of cannabis and has extensive knowledge in the science and technical aspects of cultivation. Joshua's hand-crafted techniques and attention to detail creates a premium cannabis product fitting of the OSG "never settle" mantra. Joshua is recognized by his peers as an artisanal cultivator and has received top placement in awards for concentrate and flower.

Chris Thistle is a self-taught Web & Graphic Design/IT Guru with experience serving clients professionally for over twelve years. Chris became an EMT in pursuit of his passion of helping others with medicine and science. Chris strengthened his passion by learning about cannabidiol and tetrahydrocannabinol. Chris is the in-house expert on the human endocannabinoid system and the effects of CBD & THC. Chris has developed a proprietary branded "Terpene Station," called Thistle Terpenes, with intent to develop into a cannabis infused product upon licensure. Chris' terpene mixtures and infusions assist in improving quality of life and alleviating a plethora of ailments.

Attorney Nicholas A. Gomes has owned and operated a general law practice for the past five years with offices in New Bedford, Fall River and Boston. Nicholas specializes in civil litigation, real estate, construction contracts and disputes, environmental matters, business, estate planning, personal injury, and consumer protection law. Nicholas also holds ownership and management of a real estate brokerage and development firm with an ancillary construction company performing concrete and excavation services. Nicholas represents many individuals and businesses in the City of New Bedford including retail, restaurant, and construction industries. Nicholas has extensive knowledge and experience of working with the local municipality. Nicholas also provides legal services to low-to-moderate income individuals as a member of the Justice Bridge non-profit.

Job Roach has been associated with the Medical Industry for the past 15 years, working with many physicians & specialists. He has spent the last 8 years working in medical sales and helping patients improve their quality of life. Recently in 2016, Job co-founded JASGAR Medical, which is a medical distributor of wellness & supplement products. His extensive medical background allows him to work simultaneously with physicians and patients on a daily basis, bringing great value to the team.

Hans Doherty has a background in the insurance & culinary arts industry. After graduating from Johnson & Wales University, Hans worked up and down the east coast as a chef and restaurant manager. He spent the next 25 years selling home, auto, business & marine insurance. Now, acting as the Chief Marketing Officer for Tree Beard Inc., Hans utilizes his vast book of business to make networking connections and bring new contracts and partnerships to the table.

# Greenpoint Insurance Advisors, LLC

19751 E. Main Street, Suite 331, Parker, CO 80138 303.841.8999

Nicholas A. Gomes, Esquire  
Tree Beard Inc.  
319A Union Street  
New Bedford, MA 02740

October 26, 2019

Re: Commercial Cannabis Insurance Procurement

Dear Mr. Gomes:

Tree Beard Inc., d/b/a Old Soul Gardens ("Tree Beard") to be located at 1 Nauset Street, New Bedford, MA 02746 has begun the process for meeting the statutory insurance requirements stated in 935 CMR: CANNABIS CONTROL COMMISSION CMR 500.000, ADULT USE OF MARIJUANA Section 500.105: General Operational Requirements for Marijuana Establishments (J).

Greenpoint Insurance Advisors, LLC is pleased to provide you with a proposal for commercial liability and business property insurance as part of your application process to be granted a recreational cannabis licensee in the State of Massachusetts.

The attached quote was underwritten and represents coverage from an approved insurance carrier for the scope of risks associated with operating as a cannabis licensee. The limits of liability are for \$1,000,000 per occurrence and \$2,000,000 aggregate and business property of \$500,000.

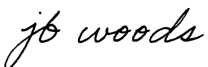
If Tree Beard is granted a recreational cannabis license, then the plan to procure insurance will be based on these factors:

- Finalize business locations and operations
- Meet any lease or other agreements pertaining to insurance obligations
- Evaluate coverage and risk concerns of Tree Beard
- Meet or exceed statutory requirements of \$1,000,000 per occurrence and \$2,000,000 aggregate including a separate application to procure product liability insurance.

If you, the State of Massachusetts, or local jurisdiction should have any questions, please do not hesitate to contact me at the email below.

Thank you for the opportunity to assist Tree Beard with procuring insurance.

Sincerely Yours,



JB Woods

[jb@gpbusinessinsurance.com](mailto:jb@gpbusinessinsurance.com)

Attached: Canopus US Insurance Quote for Tree Beard, Product Brochure



Hull & Company, LLC  
8400 E. Prentice Ave, Suite 535  
Greenwood Village, CO 80111  
(303)217-4855 Fax: (866)610-8043  
Managing General Agents ■ Wholesale Insurance Brokers

**DATE:** 10/26/2019  
**TO:** JB Woods  
GREENPOINT INSURANCE ADVISORS, LLC  
19751 Mainstreet, Suite 331  
Parker, CO 80138  
**Agency Fax:** (303)380-1250  
**Agency Phone:** (303)841-8999

**Agency Code:** 104361

**FROM:** Jodie Faulkner  
**Phone:** (877)409-4855 **Fax:** (866)610-8043  
jodie.faulkner@hullden.com

**RE:** Tree Beard Inc., d/b/a Old Soul Gardens

**Renewal of Policy #:** NEW

### QUOTATION

#### Quotation Premium

**Policy Term:** 10/26/2019 - 10/26/2020 **Quote Exp Date:** 11/26/2019 12:01 AM

Excluding TRIA		Including TRIA	
<b>Premium:</b>	\$9,020.00	<b>Premium:</b>	\$9,020.00
Inspection Fee	\$125.00	Inspection Fee	\$125.00
Policy Fee	\$350.00	Policy Fee	\$350.00
MA SL Tax(4%)	\$360.80	<b>TRIA:</b>	\$1353.00
<b>Total:</b>	<b>\$9,855.80</b>	MA SL Tax(4%)	\$414.92
		<b>Total:</b>	<b>\$11,262.92</b>

**Commission:** 15 %  
**Minimum Earned Percent:** 25.00 % **Minimum Earned Premium:** \$ 2,255.00  
Note: Policy Fees are fully earned.  
Policy Type: Occurrence

**Carrier(s):**  
Canopus US Insurance, Inc. - 200 S. Wacker Dr, Ste 950 Chicago IL 60606  
Non-Admitted  
Hull & Company, LLC is responsible for collecting and filing the Surplus Lines taxes.

**Locations:**  
1 Nauset Street, New Bedford, MA 02746

## **Commercial Property**

Property TIV: \$0

### **Location 1 Building 1: 1 Nauset Street**

Distance to Water:

Occupancy :

Construction : Joisted Masonry

Wind Deductible : 1% subject to a minimum of \$2500.00 per occurrence

### **Cause of Loss : Special Form With Theft**

Coverage	Limit	Coins	Deductible	Valuation	Final Rate	Premium
BPP (Business Personal Property)	500,000	80%	2,500 AOP/1% Wind/Hail Ded. subj to min. ded. of \$2500	Replacement Cost	.475	\$2,375

Protective Safeguards: Central station burglar alarm,

**This quote does not include coverage for Finished Stock, Crop or Harvest Plant Material. Coverages can be added for additional premium.**

## **Commercial General Liability**

### **Coverage: General Liability - Policy Type:**

#### **Limits:**

General Aggregate:	\$2,000,000
Products/Completed Operations Aggregate:	Excluded
Each Occurrence:	\$1,000,000
Personal and Advertising Injury:	\$1,000,000
Damages to Premises Rented To You:	\$100,000
Medical Payments (any one person):	\$5,000

Deductible: \$0

### **Loc #: 1 - 1 Nauset Street**

Class	Description	Sub-Line	Basis	Exposure	Final Rate	Premium
15699	Nursery – garden-Indoor Grow/Manufacturer	Premises/Operations	Area	102,000	60	\$6,120
12375	Drugstores	Premises/Operations	Gross Sales	500,000	1.05	\$525

**Endorsements/Exclusions:** (include, but are not limited to, the following terms, conditions and exclusions.)

## **Mandatory Common Forms/Endorsements**

CUS MJ 100 (02/18) Commercial Lines Common Policy Declarations

CUS MJ 199 (08/17) Schedule of Forms and Endorsements

CUS MJ 999 (08/17) Claims Notification

CUS CO 101 (08/17) General Clauses Endorsement

CUS CO 102 (08/17) Applicable Law (U.S.A.) Clause

CUS CO 103 (08/17) Privacy Policy Statement

CUS CO 104 (08/17) Sanction Limitation and Exclusion Clause

CUS CO 105 (08/17) Minimum Earned Premium Endorsement

CUS CO 106 (08/17) Mold and Fungus Exclusion

CUS CO TNP (08/17) U.S. T.R.I.A. of 2002 as amended-Not Purchased  
IL 0021 (05/04) Nuclear Energy Liability Exclusion Endorsement  
IL 0017 (11/98) Common Policy Conditions

**Mandatory General Liability Forms/Endorsements**

CUS MJ 102 (08/17) Commercial General Liability Declarations  
CG 0001 (12/07) Commercial General Liability Coverage Part  
CG 2136 (03/05) Exclusion-New Entities  
CG 2147 (12/07) Employment-Related Practices Exclusion  
CG 2149 (09/99) Total Pollution Exclusion  
CUS GL 117 (08/17) Combination General Liability Endorsement  
CUS GL 123 (08/17) Assault and/or Battery Exclusion  
CUS GL 348 (08/17) Fines, Penalties, Punitive or Exemplary Damages  
CG 2104 (11/85) Exclusion-Products/Completed Operations Hazard  
CUS GL 236 (08/17) Audit Premium Amendatory Endorsement  
CUS GL 241 (08/17) Exclusion-Sexual Abuse or Molestation  
CUS GL 244 (08/17) Exclusion-Total Liquor  
CUS GL 312 (08/17) Exclusion-Professional Liability  
CG 2196 (03/05) Silica or Silica Related Dust Exclusion  
CG 2144 (07/98) Limitation of Coverage to Designated Premises  
CUS MJ 108 (08/17) Exclusion-Residential Occupancy

**Property Mandatory Forms/Endorsements**

CUS MJ 101 (08/17) Property Declarations Page  
CP 0010 (06/07) Building & Personal Property Coverage  
CP 0090 (07/88) Commercial Property Conditions  
CP 1030 (06/07) Cause of Loss-Special Form  
IL 0935 (07/02) Computer Related Losses Exclusion  
CUS CP 101 (08/17) Total or Constructive Loss Clause  
CUS CP 254 (08/17) Additional Coverage-Asbestos  
CUS MJ 420A (08/17) Limitation of Coverage-Cannabis Operations  
CUS MJ 420B (08/17) Cannabis Operations-Additional Exclusions and Limitations

**Conditions:** (include, but are not limited to, the following terms, conditions and exclusions.)

100% Minimum & Deposit

25% Minimum Earned Premium

A written bind request must be received prior to quote expiration date as coverage cannot be backdated or presumed bound without confirmation from a representative of Hull & Co. Denver. If the written request to bind is not received by renewal date or quote expiration, there is no coverage and the file will be considered closed.

Completed/Signed Affidavit

No Flat Cancellations

Policy Fees are 100% Fully Earned

Policy is subject to audit

Subject to Certified Terrorism form (TRIA), completed, signed and dated by applicant.

Subject to completed, signed and dated Acord applications signed by both the insured and the producer with coverage and exposures matching quote bound. If any differences the binder and/or policy prevail.

Subject to inspection and compliance with recommendations

Subject to No Losses

Subject to insured being issued a Massachusetts cannabis license and underwriting of new application particularly exposure rating of location

**Special Provisions:**

This quotation is being offered on the basis indicated. It is incumbent upon you to ascertain the accuracy of the quote, and to review with the insured the terms of the quote carefully, as the coverage, terms and conditions may be different than those on original application. All requests to bind coverage must be received in our office in writing. Coverage cannot be backdated or presumed to be bound without confirmation from an authorized representative of Hull & Company, LLC. Please advise your client that the policy dictates the actual terms of coverage and in the event of differences, the policy prevails.

Be advised that if Hull & Company, LLC has not received a response from you by the expiration date of this quote, we will consider this quotation closed. Please be sure to check the carrier's A. M. Best rating to satisfy you and your client's interests.

Please review and advise if you have any questions. We look forward to hearing from you concerning placement of this coverage.

## POLICYHOLDER DISCLOSURE

### NOTICE OF TERRORISM INSURANCE COVERAGE

You are hereby notified that under the Terrorism Risk Insurance Act of 2002 ("TRIA") under the revised Act cited as Terrorism Risk Insurance Program Reauthorization and Extension Act of 2007 (TRIPRA), that you have a right to purchase insurance coverage for losses arising out of acts of terrorism, as defined in Section 102(1) of the act: The term "act of terrorism" means any act that is certified by the Secretary of the Treasury, in concurrence with the Secretary of State, and the Attorney General of the United States – to be an act of terrorism; to be a violent act or an act that is dangerous to human life, property; or infrastructure; to have resulted in damage within the United States, or outside the United States in the case of an air carrier or vessel or the premises of a United States mission; and to have been committed by an individual or individuals, as part of an effort to coerce the civilian population of the United States or to influence the policy or affect the conduct of the United States Government by coercion. Any coverage you purchase for "acts of terrorism" shall expire at 12:00 midnight December 31, 2020, the date on which the TRIPRA Program is scheduled to terminate or the expiry date of the policy whichever occurs first, and shall not cover any losses or events which arise after the earlier of these dates.

**YOU SHOULD KNOW THAT COVERAGE PROVIDED BY THIS POLICY FOR LOSSES CAUSED BY CERTIFIED ACTS OF TERRORISM IS PARTIALLY REIMBURSED BY THE UNITED STATES UNDER A FORMULA ESTABLISHED BY FEDERAL LAW. UNDER THIS FORMULA, THE UNITED STATES PAYS 85% OF COVERED TERRORISM LOSSES EXCEEDING THE STATUTORILY ESTABLISHED DEDUCTIBLE PAID BY THE INSURER(S) PROVIDING THE COVERAGE. THE PREMIUM CHARGED FOR THIS COVERAGE IS PROVIDED BELOW AND DOES NOT INCLUDE ANY CHANGES FOR THE PORTION OF LOSS COVERED BY THE FEDERAL GOVERNMENT UNDER THE ACT.**

	I hereby elect to purchase coverage for acts of terrorism for a prospective premium of <u>\$1,353.00</u> .
	I hereby elect to have coverage for acts of terrorism excluded from my policy. I understand that I will have no coverage for losses arising from acts of terrorism.

\_\_\_\_\_  
Policyholder/Applicant's Signature

\_\_\_\_\_  
Canopus US Insurance, Inc.  
Insurer

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Policy Number

\_\_\_\_\_  
Date

20\_\_

I/We Tree Beard Inc., d/b/a Old Soul Gardens of \_\_\_\_\_ do hereby state that in, \_\_\_\_\_, 20 \_\_, I/We directed GREENPOINT INSURANCE ADVISORS, LLC my/our Insurance Broker to obtain insurance against certain risks as described herein. My/Our Insurance Broker informed us that the required insurance could not be obtained from, or would not be written by, companies licensed or admitted to transact business in the Commonwealth of Massachusetts.

I/We, the Assured, was/were informed that the type and amount of insurance shown below could be obtained from certain insurers not admitted to transact business in the Commonwealth. I/We was/were further informed:

- A. The surplus lines insurer with whom the insurance was placed is not licensed in this state and is not subject to Massachusetts regulations.**
- B. In the event of the insolvency of the surplus lines insurer, losses will not be paid by the state insurance guaranty fund.**

Signature by Assured: \_\_\_\_\_

Print Name: \_\_\_\_\_

Date: \_\_\_\_\_

**THIS PORTION MUST BE COMPLETED AND SIGNED BY THE ORIGINAL BROKER**Name of Insured Tree Beard Inc., d/b/a Old Soul Gardens Address 1 Nauset Street, New Bedford, MA 02746

Location of Property \_\_\_\_\_

Description \_\_\_\_\_

Coverage Multi-LineLimit \$ \_\_\_\_\_ Premium \$9,020.00

I/We hereby verify that I/We explained the foregoing to the insured and it was acknowledged that he/she understood such.

License# \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

A copy of this affidavit must be kept in the original broker's file and a copy must be given to the assured at the time said copy was completed by him/her.

**AFFIDAVIT BY SPECIAL BROKER**

I, \_\_\_\_\_ of Hull & Company, LLC in said county of \_\_\_\_\_ depose and say that I was engaged directly by the Assured named herein or informed by the Assured's Insurance licensed Agent/Broker that after diligent efforts, he/she is unable to procure in companies admitted to do business in this Commonwealth the amount and/or type of insurance necessary to protect the insurable interests described above. This Affidavit is made to comply with the requirements of Section 168 of Chapter 175 of the General Laws, and to authorize me as a licensed special insurance broker under said section to procure insurance for said insurable interests beyond that which companies admitted to do business in the Commonwealth are willing to write thereon. The following companies or groups are among those which have accepted all or part thereof:

Company	NAIC#	Policy#	Premium
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

**Amendments to Affidavit: ( ) Increase ( ) Decrease**

I hereby verify the foregoing statements and declare that they were made under the penalties of perjury.

License# \_\_\_\_\_ Signature \_\_\_\_\_ Date \_\_\_\_\_

A copy of this affidavit must be kept in the Special Brokers File and the original filed with the Division of Insurance of the Commonwealth of Massachusetts within *twenty days* following date of procurement.

## Host Community Agreement Certification Form

The applicant and contracting authority for the host community must complete each section of this form before uploading it to the application. Failure to complete a section will result in the application being deemed incomplete. Instructions to the applicant and/or municipality appear in italics. 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(1).

### Applicant

I, Jeffrey Repi, (insert name) certify as an authorized representative of Tree Beard Inc (insert name of applicant) that the applicant has executed a host community agreement with City of New Bedford (insert name of host community) pursuant to G.L.c. 94G § 3(d) on 10/3/19 (insert date).



Signature of Authorized Representative of Applicant

### Host Community

I, JONATHAN F. MITCHELL, (insert name) certify that I am the contracting authority or have been duly authorized by the contracting authority for CITY OF NEW BEDFORD (insert name of host community) to certify that the applicant and CITY OF NEW BEDFORD (insert name of host community) has executed a host community agreement pursuant to G.L.c. 94G § 3(d) on 10/3/19 (insert date).



Signature of Contracting Authority or  
Authorized Representative of Host Community

5. Information was presented at the community outreach meeting including:
  - a. The type(s) of Marijuana Establishment 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 Marijuana Establishment to prevent diversion to minors;
  - d. A plan by the Marijuana Establishment to positively impact the community; and
  - e. Information adequate to demonstrate that the location will not constitute a nuisance as defined by law.
6. Community members were permitted to ask questions and receive answers from representatives of the Marijuana Establishment.



Attachment B

OCT 4 2019 PM 3:22



CannexExchange

October 4, 2019

Four original copies delivered in hand

City of New Bedford  
Office of the Mayor, Jonathan F. Mitchell  
Office of the City Clerk  
Planning Department  
Licensing Board  
133 William Street  
New Bedford, MA 02740

CITY CLERKS OFFICE  
NEW BEDFORD, MA  
2019 OCT -4 P 3:16  
CITY CLERK

**Re: Tree Beard, Inc., Community Outreach Public Notice**

Dear Honorable Mayor Mitchell and City Officials:

Please find this correspondence as public notice of our Community Outreach event for our proposed Recreational Cannabis Establishment in the City of New Bedford, pursuant to 935 CMR 500.101(9). We are hosting our second outreach event on Wednesday, October 16, 2019. The following excerpt will be published in the Standard Times and was provided to all abutters within 300 feet of the property.

**Notice is hereby given by Tree Beard, Inc., that a Community Outreach Meeting for a proposed Marijuana Establishment is scheduled for Wednesday, October 16, 2019, at 6:00p.m., at the Triworks Auditorium within the First Unitarian Church located at 71 8<sup>th</sup> Street, New Bedford, MA 02740. Tree Beard, Inc., is proposing licenses for cannabis cultivation, manufacture, transportation, and retail sales at 1 Nauset Street, New Bedford, MA 02746.**

The purpose of the Community Outreach Meeting is to explain the proposed Cannabis Establishment use and provide information about potential impacts to the neighborhood and community as a whole. A presentation of the proposal will begin at 6:00p.m. and thereafter the public will have an opportunity to ask questions. Please join us to learn more about our company and the future social and economic benefits we plan to bring to New Bedford. Thank you for your time and attention to this matter.

Sincerely,

  
Nicholas A. Gomes, Esquire

OCT 04 2019

OCT 4 REC'D  
NEW BED.



---

October 4, 2019

Abutters within 300' of  
1 Nauset Street  
New Bedford, MA 02746

**Re: Tree Beard, Inc., Community Outreach Public Notice**  
**Proposed Location: 1 Nauset Street, New Bedford**

Dear Sir or Madam:

Please find this correspondence as public notice of our Community Outreach event for our proposed Recreational Cannabis Establishment in the City of New Bedford, pursuant to 935 CMR 500.101(9). This notice is being provided to you as the current abutters within 300 feet of the property line of the proposed location of the Cannabis Establishment at 1 Nauset Street, New Bedford, Massachusetts.

**Notice is hereby given by Tree Beard, Inc., that a Community Outreach Meeting for a proposed Marijuana Establishment is scheduled for Wednesday, October 16, 2019, at 6:00p.m., at the Triworks Auditorium within the First Unitarian Church located at 71 8<sup>th</sup> Street, New Bedford, MA 02740. Tree Beard, Inc., is proposing licenses for cannabis cultivation, manufacture, transportation, and retail sales at 1 Nauset Street, New Bedford, MA 02746.**

The purpose of the Community Outreach Meeting is to explain the proposed Cannabis Establishment use and provide information about potential impacts to the neighborhood and community as a whole. A presentation of the proposal will begin at 6:00p.m. and thereafter the public will have an opportunity to ask questions. Please join us to learn more about our company and the future social and economic benefits we plan to bring to New Bedford. Thank you for your time and attention to this matter.

Sincerely

Nicholas A. Gomes

Nicholas A. Gomes, Esquire

Parcel 97-186	<del>213 Beacon Street</del>	<del>Firestream Inc.</del> <del>444 Myrtle Street</del> <del>New Bedford, MA 02745</del>
Parcel 97-3	<del>Right Of Way</del>	<del>Penn Central Co, Consolidated Rail Corp.</del> <del>300 Water Street Dept 1010</del> <del>Jacksonville, FL 32202</del>
Parcel 102-121	<del>5 Nauset Street</del>	<del>Oliveira Itamar SR "Trustee", Oliveira</del> <del>Itamar SR "Trustee"</del> <del>242 Larry Street</del> <del>New Bedford, MA 02745</del>
Parcel 102-82	<del>Right Of Way</del>	<del>Penn Central Co, Consolidated Rail Corp.</del> <del>300 Water Street Dept 1010</del> <del>Jacksonville, FL 32202</del>
Parcel 102-78	<del>Right Of Way</del>	<del>Penn Central Co, c/o CSX</del> <del>Transportation (1010)</del> <del>300 Water Street</del> <del>Jacksonville, FL 32202</del>
Parcel 97-164	<del>2343 Purchase Street</del>	<del>Friends Realty Inc.</del> <del>2301 Purchase Street</del> <del>New Bedford, MA 02745</del>
Parcel 97-167	<del>5 Nauset Street</del>	<del>Calantone,</del> <del>2350 Purchase Street</del> <del>New Bedford, MA 02745</del>

purpose or to enclose same will be sold at **Auction at 03:00 PM on October 28, 2019 Newbury Avenue, Fairhaven, Bristol County, Massachusetts**, all and singular premises described in mortgage,

with buildings thereon in Fairhaven, Bristol County, Commonwealth of Massachusetts bounded and described as follows:

RECEIVED by Newbury

### NEW BEDFORD TRAFFIC COMMISSION

That the Traffic rules and Regulations of the City of New Bedford Traffic Commission of June 14, 1960, and subsequent amendments thereto and are hereby further amended as follows:

1. By adding at the end of Article V, section 2, the following new description:

At the Traffic Commission Meeting: Christina Connelly and Lauri Monson, on behalf of the Administration, are proposing to create three parking spaces within the Downtown Transportation Facilities as set forth in the New Bedford Code of Ordinances, Section 48-1 in accord with the Traffic Commission's authority pursuant to Sections

Wilmington Savings Fund Society, FSB, D/B/A Christiana Trust, Not Individually but as Trustee for Hilldale Trust Present Holder of said mortgage By its attorneys, WCG Law Group, PLLC 21 High Street, Suite 208B North Andover, MA 01845 Brian W. and Michael, Ellen M., 1412-FAY-1035; October 7, 2019, October 14, 2019, October 21, 2019

Notice is hereby given by Tree Beard, Inc., that a Community Outreach Meeting for a proposed Marijuana Establishment is scheduled for Wednesday, October 16, 2019, at 6:00p.m., at the Triworks Auditorium within the First Unitarian Church located at 71 8th Street, New Bedford, MA 02740. Tree Beard, Inc., is proposing licenses for cannabis cultivation, manufacture, transportation, and retail sales at 1 Hausel Street, New Bedford, MA 02740. Oct. 7

Advertise here. Get Results.

**508-997-0011**

Announcements

unloading bundles of newspapers from delivery truck; verify receipt of bundles; distribute proper number of copies to each work station; delivering down routes; instruct new independent contractors in geographical territories for delivery; assisting with overall up of distribution center. must be able to lift and move bundles of newspapers weighing between 30 lbs. each repetitively in a short period during a shift; function safely in morning hours; have a MA driver's license and excellent driving record.

Complete an application

The Standard Time  
25 Elm Street

New Bedford, MA

9am - 2pm weekdays

or contact Steve Cat

at [scatana@s-t.com](mailto:scatana@s-t.com)

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Call 401-241-2111

Guaranteed highest price

Announcements

## Community Outreach Meeting Attestation Form

The applicant must complete each section of this form and initial each page before uploading it to the application. Failure to complete a section will result in the application being deemed incomplete. Instructions to the applicant appear in italics. 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(1).

I, Nicholas A. Gomes, (insert name) attest as an authorized representative of Tree Beard Inc (insert name of applicant) that the applicant has complied with the requirements of 935 CMR 500 and the guidance for licensed applicants on community outreach, as detailed below.

1. The Community Outreach Meeting was held on October 16, 2019 (insert date).
2. A copy of a notice of the time, place, and subject matter of the meeting, including the proposed address of the Marijuana Establishment, was published in a newspaper of general circulation in the city or town on October 7, 2019 (insert date), which was at least seven calendar days prior to the meeting. A copy of the newspaper notice is attached as Attachment A (*please clearly label the newspaper notice in the upper right hand corner as Attachment A and upload it as part of this document*).
3. A copy of the meeting notice was also filed on October 4, 2019 (insert date) with the city or town clerk, the planning board, the contracting authority for the municipality, and local licensing authority for the adult use of marijuana, if applicable. A copy of the municipal notice is attached as Attachment B (*please clearly label the municipal notice in the upper right-hand corner as Attachment B and upload it as part of this document*).
4. Notice of the time, place and subject matter of the meeting, including the proposed address of the Marijuana Establishment, was mailed on October 4, 2019 (insert date), which was at least seven calendar days prior to the community outreach meeting to abutters of the proposed address of the Marijuana Establishment, and residents within 300 feet of the property line of the petitioner as they appear on the most recent applicable tax list, notwithstanding that the land of any such owner is located in another city or town. A copy of one of the notices sent to abutters and parties of interest as described in this section is attached as Attachment C (*please clearly label the municipal notice in the upper right hand corner as Attachment C and upload it as part of this document; please only include a copy of one notice and please black out the name and the address of the addressee*).

Feel right **AT Home** in our Real Estate section  
Look for Real Estate in the "At Home" section of The Standard-Times

### **Autos for Sale**

OF BRISTOL  
 NO STATE OF  
 MASSACHUSETTS  
 NO BEING, ONE PARTICULARLY  
 INTERESTED IN THE BOOK  
 935, PAGE 40  
 he describes in the property  
 contains in the mortgage  
 shall contain in the proba-  
 lity of the publication  
 in or in this publication  
 or Mortimer's Title see  
 dated April September 17,  
 1885 and recorded in the  
 cause of the Discretionary  
 Inquiry of Deeds in  
 Book 935, Page 504.  
 TERMS OF SALE: Said  
 promises to sell the said  
 cause of the Discretionary  
 Inquiry of Deeds in  
 935, Page 504, to all liens,  
 taxes, tax titles, municipal liens  
 and assessments. If any  
 of the said mortgage above de-  
 scribed.  
 FIVE THOUSAND  
 (\$5,000.00) Dollars of the  
 purchase price must be paid  
 in cash to the bank treas-  
 urer or cashier, or check  
 at the time and place of the  
 sale by the purchaser.  
 The balance of the purchase  
 price shall be paid in cash  
 certified check, bank treasury  
 or cashier's check within  
 thirty (30) days after the  
 date of sale.  
 Other terms to be  
 announced at the sale.  
 Bank of Scott PLIC  
 1080 Main Street, Suite 200  
 Pawtucket, RI 02860  
 Attorney for U.S. Bank  
 National Association, as  
 Trustee for BANC of America  
 Funding 2008 F1 Trust,  
 Mortgage Pass-Through  
 Securities, Series 2008-F1  
 Present Holder of the  
 Mortgage  
 401-217-8702  
 Sept. 30, Oct 7 & 14

Wanted to Buy  
 WANTED: Military Items  
 Swords, knives, guns, M1  
 military, military patches, Civil  
 War, WWII, WWII, Vietnam  
 Cash. 401-241-2125  
 I can Buy Discrete To  
 Strip, Unwind, Unwind  
 Top Cash paid. FREE loc  
 pickup. Call Ronald S  
 842-6565.

Apartments  
 NB WEST St. Luke's is a  
 1 or 1BR, 3rd in historic  
 mansion. Fireplaces,  
 hardwood, off-st parking  
 \$750/mo. 508-997-438

Roommate Wanted -  
 ROOMMATE WANTED  
 27 year old, single  
 gentleman in N. Dartmouth  
 Rent neg. 774-202-6163

Commercial Property for  
 DOWNTOWN OFFICE SP  
 w/ heat. \$400/mo. 1500  
 sq ft available.  
 508-991-1332.

Autos for Sale  
 99 TOYOTA  
 CAMRY  
 50,000 original miles  
 4 cylinder, 1 owner  
 Perfect car  
 \$3900  
 508-567-8727

**09 TOYOTA  
PRIUS HYBRID**  
112,000 miles  
Excellent condition  
**\$6700**  
508-567-8727

**05 Chevy Impala**  
Red, loaded, 120k Asking  
\$2,500 or best offer  
04 Honda Civic Great  
condition, 700k, Gray  
Metalic Runs great! Asking  
\$2,000 or best offer. Can be  
seen at 1497 Sycamore St  
Faukenburg  
**\$4800**  
508-264-0992

**05 JEEP  
LIBERTY**  
4x4, 113,000 miles.  
Excellent condition.  
**\$4800**  
508-567-8727

**04 GMC SIERRA  
HD 2500**  
Crew cab, Duramax  
Diesel, 4x4,  
107,000 miles  
**\$14,800**  
508-567-8727

**Trucks**

09 Silverado W/ V-6 ext.  
cab, 8 ft. bed Rhino lined,  
bull bar, 100,000 miles,  
clean, good condition, one  
owner, maintenance records,  
103,000 mi., \$39,995.00 call  
508-998-5657

**03 TOYOTA  
TACOMA**  
Regular cab, 4 cyl,  
5 speed  
78,000 miles.  
**\$5200**  
508-567-8727

**Auto Parts Accessories**

Don't Crush, Sell To Us!  
Wanted: Cars, Trucks &  
SUVs. Cash paid! Will's A-1  
of Parts, 508-995-8032

**Fuel/Oil**


**GUARD OIL**  
508-992-3030  
508-748-1-101 (645)  
508-758-2-101 (645)

**Hauling Services**

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• Small Trees  
• Oil Tank Removal  
• Debris Removal  
• Spring Maintenance  
• Specialize in Hoarder  
Houses • Insured  
• Bobby Price  
508-771-5571 (Call)

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state and/or federal  
regulation. We do not  
advertise any proffered  
limitation, or discrimination  
on basis of race, sex,  
religion, age, handicap,  
familial status, national  
origin, ancestry, age, ethnic  
marital status, sexual  
orientation, or any other  
such prohibited basis  
involvement or discrimination  
in housing. Complaint call  
toll-free at 1-800-827-7777  
or TTY at 1-800-927-7777.  
or the Massachusetts  
Commission Against Discrimi-  
nation at 617-994-6060

Looking for an  
Open House?



WE'VE  
GOT 'EM!

The Standard-Times  
Classifieds

508-997-0011

Parcel 97-141	441 Myrtle Street	Streamline Inc. 441 Myrtle Street New Bedford, MA 02740
Parcel 97-142	191 Beacon Street	Tieu Canh "Trustee", The Calm and Joe Beatty Trust 191 Beacon Street New Bedford, MA 02740
Parcel 97-192	Beacon Street	Mint Man Auto Wash LLC 2351 Purchase Street New Bedford, MA 02740
Parcel 97-144	400 Myrtle Street	Adams Donald H, Adams Christopher 400 Myrtle Street New Bedford, MA 02740
Parcel 97-191	Beacon Street	Mint Man Auto Wash LLC 2351 Purchase Street New Bedford, MA 02740
Parcel 97-187	Myrtle Street	Donaull Daniel A 400 Myrtle Street New Bedford, MA 02740
Parcel 102-166	25 Nauset Street	Lounger Charles V 25 Central Avenue Lakeville, MA 02346
Parcel 102-77	Nauset Street	Lounger Charles V 25 Central Avenue Lakeville, MA 02346
Parcel 97-170	401 Myrtle Street	Millford Ralph K "Trustee", GHI Investment PO Box 1000 New Bedford, MA 02745
Parcel 97-143	Myrtle Street	Rodriguez Blanca, Rodriguez Alberto PO Box 1000 Dorby, CT 06442
Parcel 97-189	Beacon Street	Salant Inc. 2351 Purchase Street New Bedford, MA 02740
Parcel 97-139	2351 Purchase Street	Mint Man Auto Wash LLC 2351 Purchase Street New Bedford, MA 02740
Parcel 97-190	Purchase Street	Salant Inc. 2351 Purchase Street New Bedford, MA 02740
Parcel 97-4	Right Of Way	Penn Central Con Consolidated Rail Corp PO Box 2490 Philadelphia, PA 19109



*City of New Bedford*  
**Department of Inspectional Services**  
133 William Street, Room 308  
New Bedford, Massachusetts 02740

Tel. 508-979-1540 Fax: 508-961-3143  
E-mail: danny.romanowicz@newbedford-ma.gov

**DANNY D. ROMANOWICZ**  
**Commissioner**

December 31, 2018

Tree Beard Inc.  
C/o Jeffrey Pepi  
319 A Union Street  
New Bedford, Ma. 02740

Re: Request for determination of parcel conformance for recreational marijuana establishments

Dear Mr. Jeffrey Pepi

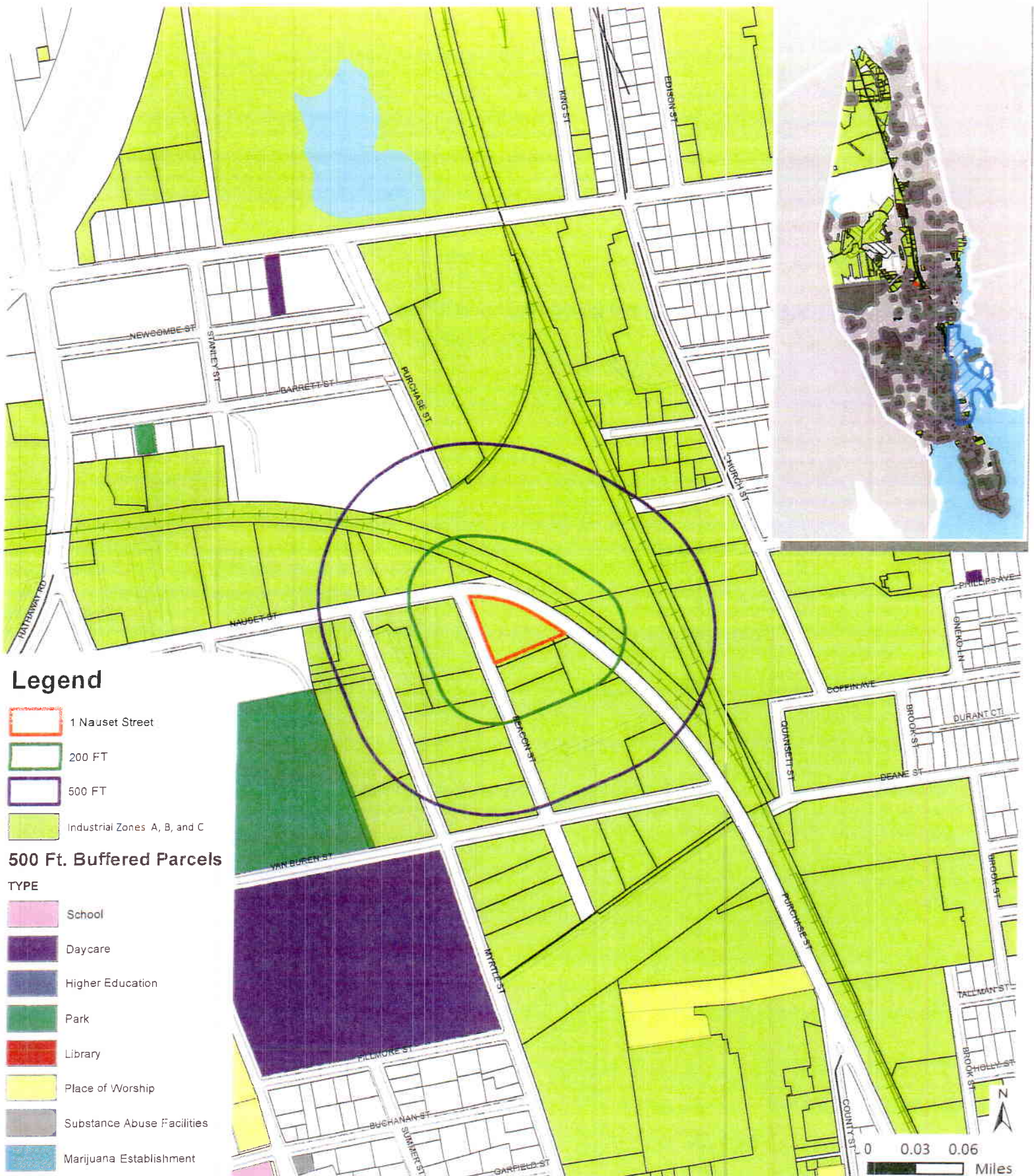
You have inquired if 5 (five) parcels are in conformance for recreational marijuana establishments, and 1 (one) for a Transportation License Only

I will list the 2 parcels that are not in violation of Section 4131B (Location Requirements and Restrictions) first.

They are Parcel 1: 1 Nauset Street  
Plot 97 Lot 167  
Zoning: IA

Parcel 2: 115 Coggeshall Street  
Plot 123 Lot 38 B  
Zoning: IA

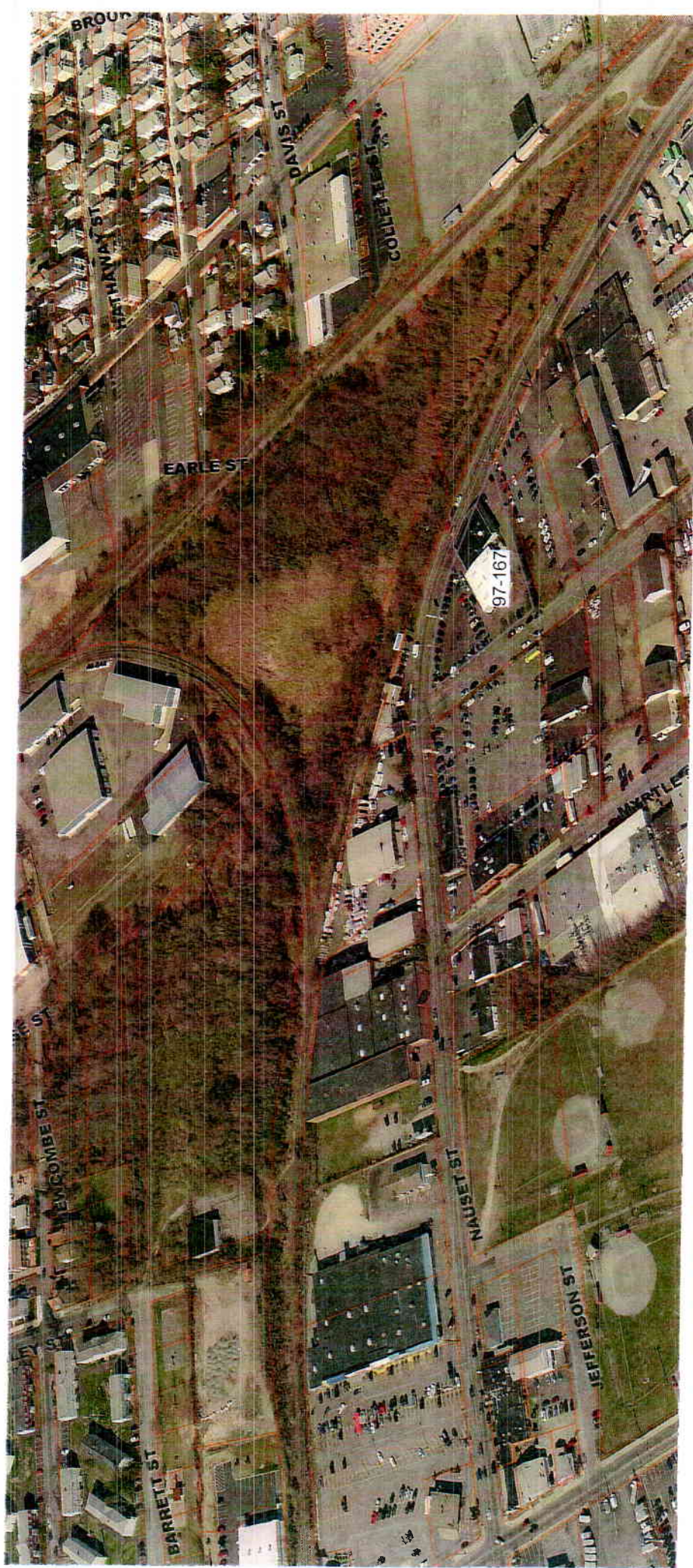
The following Parcels are in violation of Section 4131B (ii) (a)(b) (Location Requirements and Restrictions)



City of New Bedford, Massachusetts  
 Department of Planning, Housing and Community Development (DPHCD)

# 1 Nauset Street & All Proposed 500 Ft. Buffers and Industrial Zones







*Marijuana Retailer:* means an entity licensed to purchase and transport cannabis or marijuana product from Marijuana Establishments and to sell or otherwise transfer this product to Marijuana Establishments and to consumers. Retailers are prohibited from delivering cannabis or marijuana products to consumers; and from offering cannabis or marijuana products for the purposes of on-site social consumption on the premises of a Marijuana Establishment.

*Marijuana Transporter:* an entity, not otherwise licensed by the Cannabis Control Commission, that is licensed to purchase, obtain, and possess cannabis or marijuana product solely for the purpose of transporting, temporary storage, sale and distribution to Marijuana Establishments, but not to consumers. Marijuana Transporters may be an Existing Licensee Transporter or Third Party Transporter.

*Medical Marijuana Treatment Center, also known as a Registered Marijuana Dispensary (MMTC):* means an entity registered under 105 CMR 725.100 that acquires, cultivates, possesses, processes (including development of related products such as edible cannabis or marijuana products, tinctures, aerosols, oils, or ointments), transfers, transports, sells, distributes, dispenses, or administers marijuana, products containing cannabis or marijuana, related supplies, or educational materials to registered qualifying patients or their personal caregivers for medical use.

*Substance abuse treatment facility:* a facility that provides substance abuse treatment programs, as that term is defined in 105 CMR 164.006, licensed by the Massachusetts Department of Public Health.

#### 4130B. General.

##### 4131B. Location Requirements and Restrictions.

- (i) Marijuana Establishments and Medical Marijuana Treatment Centers shall only be located in Industrial Districts A (IA), B (IB), and C (IC).
- (ii) No Marijuana Establishment or Medical Marijuana Treatment Center shall be located within:
  - (a) 500 feet of any public or private school providing education in kindergarten or any of grades 1 through 12, licensed daycare center, nursery school, preschool, building operated as part of the campus of any private or public institution of higher learning, playground, park, public library, church, **excluding chapels located within a cemetery**, substance abuse treatment facility, Marijuana Establishment, or Medical Marijuana Treatment Center; or

(b) 200 feet of any dwelling or dwelling unit.

The distance under this provision shall be measured in a straight line from the nearest point of the property line in question to the nearest point of the property line where the Marijuana Establishment or Medical Marijuana Treatment Center will be located.

- (iii) No Marijuana Establishment or Medical Marijuana Treatment Center shall be located inside a dwelling or building containing a dwelling unit or inside any building containing transient housing, including a hotel, motel, or dormitory.
- (iv) Marijuana Establishments shall satisfy the conditions and requirements of all other applicable sections of the Zoning Ordinance, including but not limited to dimensional and parking requirements.

#### 4132B. Physical Requirements and Restrictions.

- (i) All Marijuana Establishments and Medical Marijuana Treatment Centers shall be contained within a building or structure. All operations of a Marijuana Establishment or a Medical Marijuana Treatment Center must take place at a fixed location within a fully enclosed secured building and shall not be visible from the exterior of the building.
- (ii) Except for a Marijuana Transporter, no Marijuana Establishment or Medical Marijuana Treatment Center may be located in a trailer, storage freight container, motor vehicle, or other similar movable enclosure.
- (iii) No Marijuana Retailer or Medical Marijuana Treatment Center that dispenses marijuana or marijuana products to the public shall have a total gross floor area of more than 5,000 square feet.

#### 4133B. Operational Requirements and Restrictions.

- (i) The hours of operation shall be set by the special permit granting authority, but in no event shall a Marijuana Establishment or Medical Marijuana Treatment Center that dispenses marijuana or marijuana products to the public be open to the public between the hours of 7:00 p.m. and 10:00 a.m., Monday through Sunday.
- (ii) No drive-through service shall be permitted at a Marijuana Establishment or Medical Marijuana Treatment Center.



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

No Fee

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

**Statement of Change of Supplemental Information**

(General Laws, Chapter 156D, Section 2.02 AND Section 8.45; 950 CMR 113.17)

**1. Exact name of the corporation:** TREE BEARD INC.

**2. Current registered office address:**

Name: UNITED STATES CORPORATION AGENTS, INC.

No. and Street: 101 BILLERICA AVE., BLDG. 5, SUITE 204

City or Town: NORTH BILLERICA State: MA Zip: 01862 Country: USA

**3. The following supplemental information has changed:**

☒ *Names and street addresses of the directors, president, treasurer, secretary*

Title	Individual Name First, Middle, Last, Suffix	Address (no PO Box) Address, City or Town, State, Zip Code
PRESIDENT	JEFFREY PEPI	1541 PURCHASE ST. UNIT 2 NEW BEDFORD, MA 02740 USA
TREASURER	JOB ROACH	25 MIDDLE ST SOUTH DARTMOUTH, MA 02748 USA
SECRETARY	CHRISTOPHER THISTLE	1541 PURCHASE ST NEW BEDFORD, MA 02740 USA
VICE PRESIDENT	NICHOLAS A GOMES ESQ	382 MAIN ST ACUSHNET, MA 02743 USA
DIRECTOR OF PRODUCTION	JOSHUA CRAIG	58 HEMLOCK POINT E. FREETOWN, MA 02717 USA
CMO	HANS DOHERTY	121 FARMFIELD ST FAIRHAVEN, MA 02719 USA
DIRECTOR	HANS DOHERTY	121 FARMFIELD ST FAIRHAVEN, MA 02719 USA
DIRECTOR	CHRISTOPHER THISTLE	1541 PURCHASE ST NEW BEDFORD, MA 02740 USA
DIRECTOR	NICHOLAS A GOMES ESQ	382 MAIN ST ACUSHNET, MA 02743 USA
DIRECTOR	JEFFREY PEPI	1541 PURCHASE ST. UNIT 2 NEW BEDFORD, MA 02740 USA
DIRECTOR	JOB ROACH	25 MIDDLE ST SOUTH DARTMOUTH, MA 02748 USA
DIRECTOR	JOSHUA CRAIG	58 HEMLOCK POINT E. FREETOWN, MA 02717 USA

☒ **Fiscal year end:**

December

☒ **Type of business in which the corporation intends to engage:**

RETAIL, MANUFACTURING, AGRICULTURAL, TRANSPORT

☒ **Principal office address:**

No. and Street: 319A UNION ST  
City or Town: NEW BEDFORD State: MA Zip: 02740 Country: USA

☒ **g. Street address where the records of the corporation required to be kept in the Commonwealth are located (*post office boxes are not acceptable*):**

No. and Street: 319A UNION ST  
City or Town: NEW BEDFORD State: MA Zip: 02740 Country: USA  
**which is**

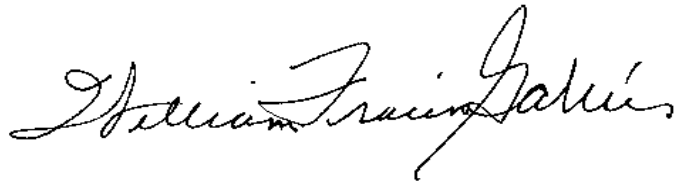
☒ its principal office ☐ an office of its transfer agent  
☐ an office of its secretary/assistant secretary ☐ its registered office

**Signed by JEFFREY PEPI, its PRESIDENT  
on this **19** Day of **March**, 2019**

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:

March 19, 2019 01:40 PM

A handwritten signature in black ink, reading "William Francis Galvin". The signature is written in a cursive style with a large, stylized 'G' at the end.

WILLIAM FRANCIS GALVIN

*Secretary of the Commonwealth*

# **CORPORATE BYLAWS OF TREE BEARD INCORPORATED**

## **ARTICLE 1. OFFICES OF THE CORPORATION.**

**Section 1. Principal Office.** The principal office of the corporation and other offices of the corporation shall be at the locations, within or without the corporation's state of incorporation (the "State"), as the directors may specify from time to time. The secretary of this corporation will keep a copy of the corporation's Articles of Incorporation (or similar incorporating document), these bylaws, minutes of directors' and shareholders' meetings, stock certificates and stubs, a register of the names and interests of the corporation's shareholders, and other corporate records and documents at the principal office.

**Section 2. Registered Agent.** For receipt of official legal and tax correspondence from the State of Incorporation, the registered agent of the corporation (sometimes known as a resident agent, statutory agent, agent for service of process, or delivery of service address) shall be maintained in accordance with the requirements of the State of Incorporation.

## **ARTICLE 2. SHAREHOLDER'S MEETINGS.**

**Section 1. Annual meeting.** The annual meeting of shareholders shall be held in the month following the end of each fiscal year of the corporation on any day of that month as determined by the board of directors.

**Section 2. Special meetings.** Special meetings of the shareholders for any purpose or purposes permitted by law may be called by the president of the corporation or by the board of directors. Such meetings shall also be called by the president at the request of the holders of not less than one tenth of the outstanding shares of the corporation entitled to vote at the meeting.

**Section 3. Location.** Meetings of the shareholders may be held at any location, within or without the State, designated by the board of directors or, in the absence of a designation by the board of directors, by the person or persons who call such meeting. If no designation is made, the meeting shall be held at the principal office of the corporation.

**Section 4. Notice.** Notices of meetings, annual or special, must be given in writing to shareholders entitled to vote at the meeting by the secretary or an assistant secretary or, if there is no such officer, by any director or shareholder.

Notices of shareholders' meetings must be given either personally or by first-class mail or other means of written communication, addressed to the shareholder at the address of the shareholder appearing on the stock register of the corporation or given by the shareholder to the corporation for the purpose of notice. Notice of a shareholders' meeting must be given to each shareholder no less than two weeks prior to the meeting.

This notice will state the place, date, and hour of the meeting and the general nature of the business to be transacted. The notice of an annual meeting and any special meeting at which directors are to be elected will include the names of the nominees that, at the time of the notice, the board of directors intends to present for election.

**Section 5. Waiver of Notice.** Any shareholder may waive notice of any meeting before or after the meeting. Such waiver must be in writing signed by the shareholder and delivered to the secretary of the corporation for inclusion in the minutes of the meeting.

**Section 6. Quorum and voting.** Every shareholder entitled to vote is entitled to one vote for each share held, except as otherwise provided by law. A shareholder entitled to vote may vote part of his or her shares in favor of a proposal and refrain from voting the remaining shares or vote them against the proposal. If a shareholder fails to specify the number of shares he or she is affirmatively voting, it will be conclusively presumed that the shareholder's approving vote is with respect to all shares the shareholder is entitled to vote.

Except as otherwise required by applicable law, a majority of the outstanding shares of the corporation entitled to vote, represented in person or by proxy, shall constitute a quorum at a meeting of the shareholders. Each outstanding share entitled to vote shall be entitled to one vote upon each matter voted on at a meeting of

shareholders. Except as otherwise required by applicable law, the vote of a majority of the shareholders present in person or by proxy at a meeting at which a quorum is present shall be the act of the shareholders.

**Section 7 Proxies.** At meetings of the shareholders, a shareholder may vote in person or by proxy executed in writing in compliance with applicable law and filed with the secretary of the corporation at or before the time of the meeting.

**Section 8. Informal action by shareholders.** Any action required or permitted by law to be taken by the shareholders at a meeting may be taken without a meeting if one or more consents in writing, setting forth the action so taken, shall be signed by all of the shareholders entitled to vote at a meeting.

### **ARTICLE 3. DIRECTORS.**

**Section 1. General powers.** The business and affairs of the corporation shall be managed by the board of directors.

**Section 2. Initial directors.** The initial board of directors shall be comprised of the following initial directors:

Joshua Craig, Nicholas A. Gomes, Esq., Jeffrey Pepi, Christopher Thistle, Job Roach, Hans Doherty

**Section 3. Number.** The number of directors constituting the board of directors shall be not less than one nor more than seven. Within such limits, the number may be fixed or changed from time to time by the vote of a majority of the shareholders or by vote of a majority of the directors.

**Section 4. Election and Tenure of Office.** The directors are elected at the annual meeting of the shareholders and hold office until the next annual meeting and until their successors have been elected and qualified.

**Section 5. Regular meetings.** A regular meeting of the board of directors shall be held immediately after, and at the same place as, the annual meeting of shareholders. The board of directors may, by resolution, provide for additional regular meetings of the board.

**Section 6. Special meetings.** Special meetings of the directors for any purpose or purposes permitted by law may be called by the president of the corporation or by any two directors. The person or persons who call such meeting may fix any time or place for the holding of such meeting.

**Section 7. Notice.** Notices of meetings, annual or special, must be given in writing to directors by the secretary or an assistant secretary or, if there is no such officer, by any director or shareholder.

Notices of directors' meetings must be given either personally or by first-class mail or other means of written communication, addressed to the director at the address of the director appearing on the records of the corporation or given by the director to the corporation for the purpose of notice. Notice of a directors' meeting will be given to each director at least two weeks prior to the meeting, unless a greater period is required under the state corporation statutes for giving notice of a meeting.

This notice will state the place, date, and hour of the meeting and the general nature of the business to be transacted. The notice of an annual meeting and any special meeting at which directors are to be elected will include the names of the nominees that, at the time of the notice, the board of directors intends to present for election.

**Section 8. Waiver of Notice.** Any director may waive notice of any meeting before or after the meeting. Such waiver must be in writing signed by the director and delivered to the secretary of the corporation for inclusion in the minutes of the meeting.

**Section 9. Quorum and voting.** Except as otherwise required by applicable law, a majority of the directors shall constitute a quorum at a meeting of the directors. Each director shall be entitled to one vote upon each matter voted on at a meeting of the directors. Except as otherwise required by applicable law, the vote of a majority of the directors present at a meeting at which a quorum is present shall be the act of the board of directors.

**Section 10. Informal action by directors.** Any action required or permitted by law to be taken by the directors at a meeting may be taken without a meeting if one or more consents in writing, setting forth the action so taken, shall be signed by all of the directors entitled to vote at a meeting.

the chairperson of the board of directors, the president, the secretary, or the board of directors, unless the notice specifies a later time for the effectiveness of the resignation. If the resignation is effective at a later time, a successor may be elected to take office when the resignation becomes effective.

Directors may be removed from office, and vacancies on the board of directors may be filled, in any manner allowed by applicable law.

#### **ARTICLE 4. OFFICERS.**

**Section 1. Number.** The officers of the corporation shall be a president, a secretary, and a treasurer (or officers with different titles that perform the similar duties of these officers), which are appointed by the board of directors, with the optional appointment of one or more vice-presidents at the discretion of the board. The board of directors may appoint such other additional officers as it may see fit from time to time. Subject to contractual agreements approved by the board of directors, officers of the corporation shall serve at the pleasure of the board of directors, and shall have the authority and duties specified from time to time by the board of directors, and shall receive salary and benefits as may be approved by the board.

**Section 2. President.** The president has general supervision, direction, and control of the day-to-day business and affairs of the corporation, subject to the direction and control of the board of directors. The president presides at all meetings of the shareholders and directors and is an ex officio member of all the standing committees, including any executive committee of the board, and has the general powers and duties of management usually vested in the office of president or chief executive officer of a corporation and other powers and duties as may from time to time be prescribed by the board of directors or these bylaws.

**Section 3. Treasurer.** The treasurer will keep and maintain, or cause to be kept and maintained, adequate and correct books and records of accounts of the properties and business transactions of the corporation.

The treasurer will deposit monies and other valuables in the name and to the credit of the corporation with the depositories designated by the board of directors. He or she will disburse the funds of the corporation in payment of the just demands against the corporation; will render to the president and directors, whenever they request it, an account of all his or her transactions as chief financial officer and of the financial condition of the corporation; and have such other powers and perform such other duties as may from time to time be prescribed by the board of directors.

**Section 4. Secretary.** The corporate secretary (or other corporate officer designated by the board of directors to maintain and keep corporate records) will keep, or cause to be kept, at the principal office of the corporation, a book of minutes of all meetings of directors and shareholders. The minutes will state the time and place of holding of all meetings; whether regular or special, if special, how called or authorized; the notice given or the waivers of notice received; the names of those present at directors' meetings; the number of shares present or represented at shareholders' meetings; and an account of the proceedings.

The secretary will keep, or cause to be kept, at the principal office of the corporation, or at the office of the corporation's transfer agent, a share register, showing the names of the shareholders and their addresses, the number and classes of shares held by each, the number and date of certificates issued for shares, and the number and date of cancellation of every certificate surrendered for cancellation.

The secretary will keep, or cause to be kept, at the principal office of the corporation, the original or a copy of the bylaws of the corporation, as amended or otherwise altered to date, certified by him or her.

The secretary will give, or cause to be given, notice of all meetings of shareholders and directors required to be given by law or by the provisions of these bylaws. He or she will prepare, or cause to be prepared, an alphabetical listing of shareholders for inspection prior to and at meetings of shareholders as required these bylaws.

The secretary has charge of the seal of the corporation (if applicable) and has such other powers and may perform such other duties as may from time to time be prescribed by the board or these bylaws.

#### **ARTICLE 5. BOOKS AND RECORDS.**

**Section 1. Books and records.** The corporation shall create and maintain such books and records, including minutes of meetings, stock ledgers, and financial records, as may be required by law and any such additional records as may be specified by the directors and officers from time to time.

**Section 2. Inspection by shareholders.** To the extent required by applicable law, and to the additional extent permitted from time to time by the directors, shareholders shall have the right to inspect the books and records of the corporation.

#### **ARTICLE 6. MISCELLANEOUS.**

**Section 1. Share certificates.** Shareholders of the corporation shall be entitled to one or more certificates representing shares owned by such shareholders. Share certificates shall be in the form specified from time to time by the board of directors.

**Section 2. Dividends and distributions.** The board of directors may from time to time declare, and the corporation may pay, dividends on outstanding shares of the corporation, subject to limitations provided by law and the articles of incorporation of the corporation.

**Section 3. Regular and executive committees.** The board of directors may designate one or more regular committees to report to the board on any area of corporate operation and performance.

To the extent allowed under state corporate statutes, the board of directors also may designate and delegate specific decision-making authority to one or more executive committees, each consisting of two or more directors, that have the authority of the board of directors to approve corporate decisions in the specific areas designated by the board of directors.

**Section 4. Seal.** The board of directors may adopt, and from time to time modify, a corporate seal.

**Section 5. Fiscal year.** The fiscal year of the corporation shall be the period designated by the board of directors.

**Section 6. Amendment.** These bylaws may be amended from time to time by the directors or the shareholders in the manner permitted by applicable law.

#### **Certification:**

The foregoing bylaws are certified to be the bylaws of the corporation as adopted by the board of directors on the 8TH day of FEBRUARY, 20 19.

  
\_\_\_\_\_  
**Christopher Thistle, SECRETARY**



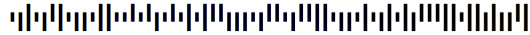
Commonwealth of Massachusetts  
Department of Revenue  
Christopher C. Harding, Commissioner

mass.gov/dor

Letter ID: L0185630784  
Notice Date: October 22, 2019  
Case ID: 0-000-658-394



## CERTIFICATE OF GOOD STANDING AND/OR TAX COMPLIANCE



JEFFREY PEPI  
TREE BEARD INC  
1541 PURCHASE ST UNIT 2  
NEW BEDFORD MA 02740-6811

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

The Commissioner of Revenue certifies that, as of the date of this certificate, TREE BEARD INC 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, 8:30 a.m. to 4:30 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

## **TREE BEARD, INC.**

### **DIVERSITY PLAN**

1. **General:** Tree Beard, Inc., is committed to a diverse and inclusive workforce in the operation of its cannabis establishment. Tree Beard’s diversity plan was created to enrich our community members and level the playing field for all individuals after years of oppression, discrimination, and inequality for minorities in society and the workforce. Tree Bead strives to promote equity among minorities, women, veterans, people with disabilities, and people of gender identities and sexual orientation who self-identity as lesbian, gay, bisexual, transgender, queer, or questioning such identities and commonly known as LGBTQ+ (hereinafter “equitable demographic group”). Tree Beard intends to promote equity by providing the equitable demographic group of individuals with tools and opportunities they need to achieve social and economic self-sustainability. Our company is seeking to create an inclusive work environment welcoming and respecting all people based on merit and skill regardless of race, creed, colors, national origins, disabilities, gender, age, sexuality and orientation. Our diversity will make our company stronger and improve our ability to empower our community.

2. **Equitable Demographic Group defined:** The equitable demographic group this diversity plan seeks to benefit shall be further defined where applicable for percentage purposes as follows:

minorities-	10%
women-	10%
veterans-	10%
people with disabilities-	10%
LGBTQ+ -	<u>10%</u>
Total:	50%

3. **Compliance:** Tree Beard shall adhere to all laws in fulfilling its diversity plan, including, but not limited to the requirements set forth in 935 CMR 500.105(4) which provides the permitted and prohibited advertising, branding, marketing, and sponsorship practices of Marijuana Establishments. This plan, and all actions taken by Tree Beard, will not violate the Commission’s regulations with respect to limitations on ownership or control or other applicable state laws. The progress or success of this plan will be demonstrated upon each license renewal period, commencing one year from provisional licensure.

4. **Goals:**

**I. Increasing the ownership interest of individuals from the equitable demographic group in Tree Beard, Inc., to 50%.**

**II. Increasing the number of individuals from the equitable demographic group holding management and executive positions in Tree Beard, Inc., to 50% of all managers and executives.**

**III. Increasing the number of individuals from the equitable demographic who are employed by Tree Beard, Inc., to 50% of all employees.**

**IV. Providing at least 25 individuals from the equitable demographic group with tools and opportunities to achieve their goal of entering the adult-use cannabis industry each year.**

**V. Increasing the number of businesses owned by individuals from the equitable demographic group that contract or otherwise do business with Tree Beard, Inc. to 50% of all businesses.**

3. Programs to achieve Goals:

**I. Increasing the ownership interest of individuals of the equitable demographic group in Tree Beard, Inc., to 50% through the use of non-discriminatory sales, targeted advertisement of stock sales, and priority offerings.**

I. Tree Beard's original owners support the company's perpetual commitment to an inclusive environment and economic opportunities for all based upon merit regardless of their own race, sex, status, gender identities, and sexual orientation. Tree Beard intends to increase the ownership interest of individuals of the equitable demographic group by offering any future sales of any ownership interest in the company in a non-discriminatory manner. Tree Beard intends to increase its future ownership interest of individuals of the equitable demographic group by publicizing future public offerings with a focus of interest for persons of the equitable demographic group in the local Standard Times (New Bedford) and Herald (Fall River) newspapers. Tree Beard will prioritize sale offerings to companies and individuals certified for minority business enterprises, women business enterprises, and veteran business enterprises.

**II. Increasing the number of individuals from the equitable demographic group holding management and executive positions in Tree Beard, Inc., to 50% of all managers and executives.**

II. Tree Beard seeks to increase the management and executive positions held by individuals from the equitable demographic group to 50% of all employees. Tree Beard intends to increase its number of skilled managers and executives from the equitable demographic group through its hiring and training procedures. Tree Beard will seek to hire local individuals from the equitable demographic group through the use of targeted hiring focusing on the equitable demographic group, rigorous applicant review, and advertisement of employment opportunities in local newspapers with high population demographics matching the equitable demographic group, including the local Standard Times (New Bedford) and Herald (Fall River) newspapers.

**III. Increasing the number of individuals from the equitable demographic group who are employed by Tree Beard, Inc., to 50% of all employees.**

III. Tree Beard's commitment to equity leadership will shine across the Commonwealth and beyond with its intent to employ as many individuals from the equitable demographic group from the City of New Bedford as possible. The City's minimum request is to ensure at least 20% of residents are employed, but Tree Beard strives to increase the number of employed residents to 80%. Additionally, Tree Beard will ensure 50% of all employees are from the equitable demographic group. Tree Beard intends to heavily advertise employment opportunities in the City of New Bedford and Fall River through local publication in the Standard Times (New Bedford) and Herald (Fall River) newspapers, social media, and word-of-mouth contact to our local networks and chamber of commerce. Tree Beard intends on increasing its resident employees and equitable demographic group employees by hosting several initial job fairs and future reoccurring job fairs as necessary. Tree Beard intends to maintain its employees by our hiring and training procedures.

Tree Beard utilizes a non-discriminatory hiring practice for employees. Tree Beard intends to reach out to its employees through an internal process on many matters relative to keeping them apprised of our company. Utilizing this internal process we intend to encourage our employees to recommend friends and family who are within the demographic group for employment. Tree Beard intends to promote employees based on merit of performance of duties, but will establish a promotion process that employs equity principles for a fair opportunity for all including the equitable demographic group.

**IV. Providing at least 25 individuals from the equitable demographic group with tools and opportunities to achieve their goal of entering the adult-use cannabis industry each year.**

IV. Tree Beard seeks to increase the opportunities for individuals from the equitable demographic group to enter the adult-use cannabis industry beyond its local hiring commitments by sponsoring donations to the International Cannabis Physicians Association nonprofit that conducts cannabis educational seminars and teaches skills to individuals helpful for entering the adult-use cannabis industry. Tree Beard's donations shall be made quarterly and in the minimum monetary amount of \$1,000.00 and in-kind volunteer hours of 20 hours. Tree Beard seeks to make meaningful impact with its donations and intends to increase its donation and volunteer amounts with higher frequency as revenue allows. Tree Beard and the ICPA will keep statistical tracking data to ensure at least 25 of the individuals assisted are from the equitable demographic group. Tree Beard will operate an internship program to assist individuals from the equitable demographic group obtain skills from our trained employees to strengthen opportunities to enter the industry. At least 25 individuals per year shall be in the internship program. Tree Beard will provide informational sessions to provide knowledge of employment opportunities, and training seminars for skill-building.

**V. Increasing the number of businesses owned by individuals from the equitable demographic group that contract or otherwise do business with Tree Beard, Inc. to 50% of all businesses.**

V. Tree Beard seeks to partner with as many individuals from the equitable demographic group that contract with Tree Beard. Tree Beard intends to further seek partners from the equitable demographic group that own small businesses in the cities in which we operate. Tree Beard utilizes a non-discriminatory hiring practice for third party vendors.

5. Reconciliation of Plan Success through Metrics:

Tree Beard will reconcile the success of its diversity plan by performing quarterly reviews of company statistics, third-party publications, and personnel reports relative to all actions taken to reach the seven goals. The progress or success of this plan will be demonstrated upon each license renewal period, commencing one year from provisional licensure. In an effort to fully understand the impact of Tree Beard's success, quality reporting from employees involved in effectuating the diversity plan will be reviewed and recommendations implemented. Tree Beard's measurement metrics seek to identify the:

1. the number of individuals from the equitable demographic group who were hired, retained and promoted;
2. the number of new positions created for individuals from the equitable demographic group since initial licensure;
3. the number and type of trainings, community outreach events, informational sessions,
4. the number of and type of community outreach events, information sessions, and third-party sponsorships
5. the number of postings in diverse publications and general publications in the City; and

**ICPA**  
INTERNATIONAL CANNABIS  
PHYSICIANS ASSOCIATION  
319A Union Street, New Bedford, MA 02740

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October 23, 2019

Nicholas A. Gomes, Esq.  
Tree Beard Inc.,  
319A Union Street  
New Bedford, MA 02740

Re: Acceptance of Donations

Dear Attorney Gomes:

Please be advised the International Cannabis Physicians Association (ICPA) is honored to accept donations of money and time from your organization. The ICPA is based in New Bedford and is involved in the local community and around the world with a network of affiliates. The ICPA provides educational seminars on cannabis with a focus on reducing the stigma associated with cannabis and assisting those who were disproportionately affected by cannabis prohibition. All of our events are located in New Bedford and we seek to market our programs to the general public with a target demographic of those affected by cannabis prohibition. We sponsor expungement events aimed at crimes associated with the war on drugs. We have created and are in the process of conducting a cannabis curriculum for individuals who want to learn more about cannabis and potentially pursue a career in the industry.

Please feel free to contact me with any questions or concerns. We look forward to continued work together to better our local community and repair the damages of the past.

Sincerely,

  
\_\_\_\_\_  
Jeffrey Pepi

# **TREE BEARD INC**

## **MAINTAINING FINANCIAL RECORDS**

1. General: Tree Beard Inc. will ensure that there is a locked office for the purpose of keeping its business records, including financial records, for inspection by the Cannabis Control Commission upon request.
2. Maintenance: Tree Beard Inc. will ensure that all records of a Marijuana Establishment shall be maintained in a secure location within the facility and in accordance with generally accepted accounting principles.
3. Confidentiality: Tree Beard Inc. will ensure that all records will be kept in a locked area within a secured location within the facility not accessible to the public nor easily accessible to an unauthorized individual. Access to confidential records shall be limited to only those reasonably necessary for the operation of the business.
4. Closure: Following closure of Tree Beard Inc. all records will be kept for at least two years at its own expense in a form and location acceptable to the CCC.
5. Accounting and Auditing: All of Tree Beard Inc.'s financial records shall be reviewed by an accountant or other tax professional for accuracy. Independent audits on the financial records shall be conducted annually.
6. Financial Records: All financial records of Tree Beard Inc. shall be kept as required by 935 CMR 500.000, including, but not limited to:
  - (a) Seed-to-sale tracking records for all marijuana products as required by 935 CMR 500.105(8)(e);
  - (b) Sales receipts from all license types;
  - (c) Bank statements;
  - (d) Employee payroll;
  - (e) Tax returns;
  - (f) Balance statements;
  - (g) Loan agreements;
  - (h) Assets and Liabilities;
  - (i) Monetary Transactions;
  - (j) Books of Accounts;
  - (k) Sale records;
  - (l) Salary and wages paid to each employee. 935 CMR 500.105(9)

## **TREE BEARD INC.**

### **EMPLOYEE STAFFING SUMMARY**

1. **General:** Tree Beard Inc. is a Massachusetts cannabis company sowing the seeds of innovation by focusing on the local community and consumers to promote positive growth in our local economy while ensuring consistent access to safe premium marijuana. Tree Beard Inc. is committed to quality, responsibility and sustainability. Our three primary ideals permeate through our employee staffing plan to add to our unique growth as a company. Tree Beard Inc. values are built upon a foundation of social responsibility to our clients and local communities. Our commitment is demonstrated by our plan to operate locally, hire employees from our communities with diverse backgrounds without regard for race, disability, gender, and other statuses, and manage our employees with respect and due care in accordance to all laws.
2. **Quality, Responsibility and Sustainability:** Tree Beard Inc.' fundamental commitment to our clients and community begins with creating a pure and safe quality product. Our employees are trained with our policies and procedures to ensure our quality is never compromised to fulfill our obligations to the public and greater world at large. Our future employees are provided with at least a week of in-house training with a mentor for their job description. Our employees are required to meet all training specifications as created by the Cannabis Control Commission and as set forth by Tree Beard Inc. in its Employee Continuing Training Program, audit and monitoring of employee performances.
3. **Qualifications:** Tree Beard Inc. hiring practices is focused on obtaining and maintaining a skilled and diverse workforce. Our policies include seeking to hire over 51% of employees from New Bedford residents, veteran incentive hiring, affirmative action, equal employment opportunity, a zero tolerance policy for violence, discrimination, sexual harassment, and stalking, a drug-free workplace, and Americans with Disabilities Act and Family Medical Leave Act compliance. Tree Beard Inc. is creating an inclusive work environment welcoming and respecting all people based on merit and skill regardless of race, creed, colors, national origins, disabilities, gender, age, sexuality and orientation. Our diversity will make our company stronger and improve our ability to empower our community.
4. **Employment Positions:** Tree Beard Inc. will have the following positions:
  - I. **Security:** Security will ensure all of our products are safe from seed to the consumers leaving our premises. The security division will include building security, internal and external loss prevention investigations, and operations security for our products, employees, clients, and patients. Our focus will be on the safe access to our products as well as ensuring no product is diverted to unintended individuals and for illegal uses. Security will be the first line of defense to stop the diversion of marijuana to individuals younger than 21 years of age by checking for proper identification before entry into a secured area for the retail purchase of secured products.

- II. Cannabis Consultant: A cannabis consultant provides retail assistance and processing to customers to effectuate an informed purchase of marijuana or marijuana products to fit the unique needs of the client. The cannabis consultant will be focused on providing information and advising clients so they obtain the safest and best experience through our various products and methods of consumption.
  - III. Cultivator: A cultivator harnesses our technology, equipment and nature to create and process only the highest quality marijuana flowers.
  - IV. Manufacturer: A manufacturer transforms the marijuana flower into various marijuana products including concentrates, edible infusions, oils, creams and topicals.
  - V. Manager: A manager oversees the various operations of the establishment and employees. This position designed to assist in promoting our company in the cannabis industry through operational management, research, community outreach, and regulatory compliance to ensure the company is always evolving to meet the needs of our community in a responsible manner.
  - VI. Executives: The executives of the company are Nicholas A. Gomes, Jeffrey Pepi Jr., Hans Doherty, Christopher Thistle, Job Roach and Joshua R. Craig. The executives shall operate and manage the company while fulfilling numerous positions within the company.
5. Alcohol, smoke and drug-free workplace: Tree Beard Inc. shall not allow alcohol, smoking and drug-use on its property. Such unauthorized use by an employee shall be subject to termination of employment.
  6. Records: Employee records shall be kept orderly and maintained in a secured location in accordance to the company's record policy.
  7. Termination: Any employee who violates the employee contract or any provision of the Tree Beard Inc.' policies and procedures shall be subject to immediate suspension if it is determined their actions or future employment will be detrimental to the company and the public good. Such actions justifying immediate termination and due notice to the Cannabis Control Commission include:
    - I. diverting marijuana or marijuana products;
    - II. engaging in unsafe practices with regard to operation of the company; and
    - III. any conviction or guilty plea, plea of *nolo contendere*, or admission to sufficient facts of a felony drug offense involving distribution to a minor in the Commonwealth, or a like violation of the laws of another state, the United States or a foreign jurisdiction, or a military, territorial, or Native American tribal authority.

8. Cash: Employees shall use all care and reason for the safe handling of cash at the establishment. Sales will be limited to small quantities of products to prevent an influx of cash in an unsafe manner. Cash will be maintained during hours of operation in three locations including a cash register, a cash drawer drop with vault access, and a central vault. The cash register will start with \$200.00 at the opening of each shift and be limited to \$1,200.00 at any given time. Transfers of \$1,000.00 at a time will be made from the register to the cash drawer drop. Transfers from the cash drawer drop to the central vault will be done on a regular basis as needed. All funds shall be transferred from the establishment to a financial institution on a regular secure basis as needed. The transfers for the cash drawer drop and to a financial institution will be done on a random schedule by a trained security team to prevent diversion and theft. Random, unmarked, and secure vehicles as well as potential escort from NBPD will be utilized to prevent detection.
9. Training: Employees will undergo quarterly industry trainings that are required of a registered agent.

## **TREE BEARD INC**

### **QUALIFICATIONS AND INTENDED TRAININGS FOR AGENTS**

#### 1. Positions for Employment:

##### **MRN282358- Retailer**

###### *Chief Executive Officer – CEO*

Qualifications: Responsible for providing business direction, creating, communicating, and implementing the organization's vision, mission, and overall direction – i.e. leading the development and implementation of the overall organization's strategy, fixing prices and signing business deals, recruitment, payment of salaries, signing checks and documents on behalf of the company, evaluates the success of the organization

###### *General Manager*

Qualifications: Responsible for managing the daily activities in the company, responsible for recruiting, training and managing staff, responsible for processing orders, responsible for ordering, selling and controlling all inventory, managing the organizations' budgets, keeping statistical and financial records, preparation of publicity materials and displays, handles marketing services, meeting other licensed facilities representatives and interfaces with third – party providers (vendors), controls the sales floor inventory, supervises the entire sales staff and workforce, handles any other duty as assigned by the CEO

Requirements: Retail sales manager with past experience operating a retail establishment or significant past experience in the retail sales industry.

###### *Compliance Officer*

Qualifications: The compliance officer will be responsible for ensuring that proper procedure is in place as well as followed to ensure compliance. They will be responsible for thoroughly understanding compliance laws, as well as providing adequate communication to managers and employees about such laws.

Requirements: Experience working with compliance issues and are well versed in the CCC compliance parameters.

###### *Merchandize Manager*

Qualifications: Manages vendor relations, market visits, and the ongoing education and development of the organizations' buying teams, helps to ensure consistent quality of drugs and products on our rack, responsible for the purchase of goods and products for

the organizations, responsible for planning sales, monitoring inventory, selecting the merchandise, and writing and pricing orders to vendors, ensures that the organization operates within stipulated budget.

#### *Product Specialist*

Qualifications: receives payments on behalf of the organization, issues receipt to customers, prepares financial report at the end of every working week, handles financial transaction on behalf of the company, duties will include counter support to provide guidance to clients as well as day to day operations of the retail establishment.

Requirements: Continuing Training Program

#### *Information Technologist*

Qualifications: Manages the organization website, handles ecommerce aspect of the business, responsible for installing and maintenance of computer software and hardware for the organization, manages logistics and supply chain software, Web servers, e-commerce software and POS (point of sale) systems, manages the organization's CCTV, handles any other technological and IT related duties

#### *Cleaners*

Qualifications: Responsible for cleaning the store facility at all times, ensures that toiletries and supplies don't run out of stock, cleans both the interior and exterior of the property, handles any other duty as assigned by the General Manager.

Requirements: Continuing Training Program

### **MPN281590- Manufacturer**

#### *Chief Executive Officer – CEO*

Qualifications: Responsible for providing business direction, creating, communicating, and implementing the organization's vision, mission, and overall direction – i.e. leading the development and implementation of the overall organization's strategy, fixing prices and signing business deals, recruitment, payment of salaries, signing checks and documents on behalf of the company, evaluates the success of the organization

### *General Manager*

Qualifications: Responsible for managing the daily activities in the company, responsible for recruiting, training and managing staff, responsible for processing orders, responsible for ordering, selling and controlling all inventory and other stock, managing the organizations' budgets, keeping statistical and financial records, preparation of publicity materials and displays, handles marketing services, meeting other licensed facilities representatives and interfaces with third – party providers (vendors), controls the sales floor inventory, supervises the entire sales staff and workforce, handles any other duty as assigned by the CEO

Requirements: Retail sales manager with past experience operating a retail establishment or significant past experience in the retail sales industry.

### *Compliance Officer*

Qualifications: The compliance officer will be responsible for ensuring that proper procedure is in place as well as followed to ensure compliance. They will be responsible for thoroughly understanding compliance laws, as well as providing adequate communication to managers and employees about such laws.

Requirements: Experience working with compliance issues and are well versed in the CCC compliance parameters.

### *Technician*

Qualifications: Ensures that the facility is in tip top shape (This includes turning on equipment such as computers, scales, printers and fax machines), ensures that goods and products are properly arranged, responsible for processing orders, responsible for sterilizing the counter tops, scales, and other measuring devices, handles administrative and bookkeeping tasks, inventory control, stocking shelves, and data entry, performs monthly inventory counts, file paperwork, and stock inventory, handles any other duty as assigned by the General Manager.

### *Chef*

Qualifications: Duties will include day to day operations of the manufacturing establishment. This will include cleaning, cooking, and packaging.

Requirements: Cannabinoid Training Program

### *Cleaners*

Qualifications: Responsible for cleaning the store facility at all times, ensures that toiletries and supplies don't run out of stock, cleans both the interior and exterior of the property, handles any other duty as assigned by the General Manager.

Requirements: Continuing Training Program

## **MCN281961- Cultivator**

### *Chief Executive Officer – CEO*

Qualifications: Responsible for providing business direction, creating, communicating, and implementing the organization's vision, mission, and overall direction – i.e. leading the development and implementation of the overall organization's strategy, fixing prices and signing business deals, recruitment, payment of salaries, signing checks and documents on behalf of the company, evaluates the success of the organization

### *Master Cultivator*

Qualifications: Duties will include day to day operations of the 5000sqft grow, recruiting, training and managing staff, responsible for processing orders, responsible for ordering, selling and controlling all inventory, managing the organizations' budgets, keeping statistical and managing the daily activities in the company financial records, preparation of publicity materials and displays, handles marketing services, meeting other licensed facilities representatives and interfaces with third – party providers (vendors), controls the sales floor inventory, supervises the entire sales staff and workforce, handles any other duty as assigned by the CEO

Requirements: Grow Master with over 10 years of experience and maintenance of over 10,000sqft for over 1 year with no incidents. Continuing Training Program.

### *Compliance Officer*

Qualifications: The compliance officer will be responsible for ensuring that proper procedure is in place as well as followed to ensure compliance. They will be responsible for thoroughly understanding compliance laws, as well as providing adequate communication to managers and employees about such laws.

Requirements: Experience working with compliance issues and are well versed in the CCC compliance parameters.

### *Assistant Grower*

Qualifications: Duties will include day to day operations of the cultivation establishment  
Requirements: Continuing Training Program

## **MXN281359- Transporter**

### *Comptroller Home Base*

Qualifications: The handling of all driver instructions and manifests, Compliance,  
Requirements: Prior fleet management, constant monitoring of movement of all vehicles, watching monitors, communications monitoring, HR and compliance, product storage.

### *Driver*

Qualifications: Ability to drive Tree Beard Inc.'s vehicles  
Requirements: Valid Driver License, Continuing Training Program

## **2. Agent Training:**

All employees and agents of Tree Beard Inc., must perform training prior to performing job functions. Training shall be tailored to the roles and responsibilities of the job function the employee/agent is expected to perform. In addition to specific job function training, all employees/agents shall be required to take a Responsible Vendor Program under 935 CMR 500.105(2)(b). All employee/agents shall be required to receive at least eight hours of on-going training each year.

## **3. Responsible Vendor Training Program:**

Upon licensure or renewal of licensure, as applicable, all current owners, managers, and employees of Tree Beard that are involved in the handling and sale of marijuana shall attend and successfully complete a responsible vendor program, and maintain Tree Beard's status as a "responsible vendor." Tree Beard shall select a Commission approved Responsible Vendor Training Program for its Responsible Vendor Training. All owners, managers, and employees involved in the handling and sale of marijuana shall successfully complete the responsible vendor program once a year thereafter. All new employees involved in the handling and sale of marijuana shall be required to successfully complete a responsible vendor program within ninety days of hire. Tree Beard shall offer the responsible vendor program to administrative employees to take on a voluntary basis. All records of responsible vendor training program compliance, including test results, shall be kept for four years and made available to inspection by the Commission and any other applicable licensing authority upon request during normal business hours.

## **TREE BEARD INC**

### **QUALITY CONTROL AND TESTING PROCEDURES**

- 1) General: Tree Beard is committed to providing its clients with only high quality safe cannabis products. All employees are required to follow the strict quality control and testing procedures contained below.
- 2) Independent Testing No cannabis product shall be sold or otherwise marketed for adult use that has not first been tested by an Independent Testing Laboratory and deemed to comply with the standards required under 935 CMR 500.160. Testing of marijuana products shall be performed by an Independent Testing Laboratory in compliance with the *Protocol for Sampling and Analysis of Finished Medical Marijuana Products and Marijuana-infused Products*, as amended in November, 2016, published by the DPH. Testing of environmental media (e.g., soils, solid growing media, and water) shall be performed in compliance with the *Protocol for Sampling and Analysis of Environmental Media for Massachusetts Registered Medical Marijuana Dispensaries* published by the DPH.
- 3) Adverse Laboratory Results: Tree Beard Inc. shall immediately respond to laboratory results that indicate contaminant levels are above acceptable limits established in the DPH protocols identified in 935 CMR 500.160(1), including notifying The Cannabis Control Commission within 72 hours of any laboratory testing results indicating that the contamination cannot be remediated and disposing of the production batch. The notification must be from both Tree Beard Inc. and the Independent Testing Laboratory, separately and directly. Tree Beard Inc. notification must describe a proposed plan of action for both the destruction of the contaminated product and the assessment of the source of contamination. Records of such testing shall be maintained for one year. All transportation of cannabis to and from Independent Testing Laboratories providing cannabis testing services shall comply with 935 CMR 500.105(13). All storage of cannabis at a laboratory providing cannabis testing services shall comply with 935 CMR 500.105(11). All excess cannabis must be disposed in compliance with 935 CMR 500.105(12), either by the Independent Testing Laboratory returning excess cannabis to the source Marijuana Establishment for disposal or by the Independent Testing Laboratory disposing of it directly.
- 4) Tree Beard Inc. will ensuring that only the leaves and flowers of the female marijuana plant are processed accordingly in a safe and sanitary manner as prescribed below:
  - Well cured and generally free of seeds and stems;
  - Free of dirt, sand, debris, and other foreign matter;
  - Free of contamination by mold, rot, other fungus, and bacterial diseases;
  - Prepared and handled on food-grade stainless steel tables; and
  - Packaged in a secure area.
- 5) Tree Beard Inc. will ensure that all agents whose job includes contact with marijuana is subject to the requirements for food handlers specified in 105 CMR 300.000
- 6) Tree Beard will ensure that any agent working in direct contact with marijuana shall conform to sanitary practices while on duty, including:

- Maintaining adequate personal cleanliness; and
  - Washing hands appropriately with soap and running water at a suitable temperature.
- 7) Tree Beard Inc. shall ensure that all employees will have access to hand-washing facilities with appropriate sanitization equipment such as soap, sanitary towels and dryers, that will be located in production areas and where good sanitary practices require employees to wash and sanitize their hands.
  - 8) Tree Beard Inc. will ensure that there is sufficient space for placement of equipment and storage of materials as is necessary for the maintenance of sanitary operations. All storage areas shall be kept clean, orderly and free of clutter.
  - 9) Tree Beard Inc. will ensure that all litter and waste shall be properly removed so as to minimize the development of odor and the potential for the waste attracting and harboring pests. At a minimum, all waste shall be removed from the building to appropriate locked waste disposal receptacles daily. All waste disposal areas shall be kept clean, orderly, and free of waste and clutter so as to attract and harbor pests.
  - 10) Tree Beard Inc. will have floors, walls, and ceilings that are constructed in such a manner that they may be adequately kept clean and in good repair. The property, fixtures, and building shall be kept in good clean order and repair to maintain a sanitary work condition.
  - 11) Tree Beard Inc. will use equipment and utensils designed and of such workmanship and material as to be adequately cleanable and sanitary.
  - 12) All edible products shall be prepared, handled, and stored in compliance with the sanitation requirements of 105 CMR 590.000.
  - 13) Tree Beard Inc. will ensure that all contact surfaces, shall be maintained, cleaned, and sanitized as frequently as necessary to protect against contamination. All surfaces shall be cleaned and sanitized with products approved by the US Environmental Protection Agency, in accordance with all labeled instructions.
  - 14) Tree Beard in will ensure that adequate lighting will be installed and maintained throughout the building, including, but not limited to all processing and storage areas, and areas where utensils and equipment are cleaned.
  - 15) Tree Beard Inc. will ensure all toxic items shall be identified, held, and stored in a manner that protects against contamination of marijuana.
  - 16) Tree Beard Inc. will ensure sufficient water supply is available in an adequate size and design in order to maintain necessary operations with safe, potable, and adequate supply of

Municipal water. The establishment shall have separate lines for potable and waste water lines.

- 17) Tree Beard Inc. will ensure that all employees will have access to adequate, readily accessible toilet facilities that are maintained in a sanitary condition and in good repair. Tree Beard Inc. shall monitor against and regularly sanitize against the growth of undesirable microorganisms in all areas including toilet facilities.
- 18) Tree Beard Inc. will ensure the storage and transportation of finished products will be under conditions that will protect them against physical, chemical, and microbial contamination. Finished products shall be stored, transported, and handled in a manner so as to prevent against deterioration of finished product or their containers.

## **TREE BEARD INC**

### **RECORD KEEPING**

1. **General:** Tree Beard Inc. shall keep an office for the purpose of keeping its business records for inspection by the Cannabis Control Commission (“Cannabis Control Commission”) upon request.
2. **Maintenance:** The records of a Marijuana Establishment shall be maintained in a secure location within the facility and in accordance with generally accepted accounting principles.
3. **Confidentiality:** All records shall be kept in a locked area within a secured location within the facility not accessible to the public nor easily accessible to an unauthorized individual. Access to confidential records shall be limited to only those reasonably necessary for the operation of the business.
4. **Closure:** Following closure of Tree Beard Inc., all records must be kept for at least two years at its own expense in a form and location acceptable to the CCC.
5. **Required Records:** All records shall be kept as required by 935 CMR 500.000, including, but not limited to:
  - (a) Written operating procedures as required by 935 CMR 500.105(1);
  - (b) Inventory records as required by 935 CMR 500.105(8);
  - (c) Seed-to-sale tracking records for all cannabis products as required by 935 CMR 500.105(8)(e);
  - (d) A staffing plan that will demonstrate accessible business hours and safe cultivation conditions;
  - (e) Personnel policies and procedures;
  - (f) Waste disposal records as required under 935 CMR 500.105(12)
  - (g) Business records, which shall 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, stipend 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 nonprofit corporation, if any.
  - (h) The following personnel records:
    1. Job descriptions for each employee and volunteer position, as well as organizational charts consistent with the job descriptions;
    2. A personnel record for each marijuana establishment agent. Such records shall be maintained for at least 12 months after termination of the individual’s affiliation with the Marijuana Establishment and shall include, at a minimum, the following:
      - a. all materials submitted to the Commission pursuant to 935 CMR 500.030(2);
      - b. documentation of verification of references;
      - c. the job description or employment contract that includes duties, authority, responsibilities, qualifications, and supervision
      - d. documentation of all required training, including training regarding privacy and confidentiality requirements, and the signed statement of the individual indicating the date, time, and place he or she received said training and the topics discussed, including the name and title of presenters;
      - e. documentation of periodic performance evaluations;
      - f. a record of any disciplinary action taken; and
      - g. notice of completed responsible vendor and eight-hour related duty training.
3. All background check reports obtained in accordance with 935 CMR 500.030.



**TREE BEARD, INC.**

**RESTRICTING ACCESS TO INDIVIDUALS UNDER 21**

1.     General: Tree Beard, Inc., is committed to a safe and secure cannabis establishment so that individuals twenty-one and older may access quality recreational cannabis products.
  
2.     Identification: All individuals seeking access to the premises shall be positively identified with a government issued identification card to limit access solely to individuals 21 years of age or older. No individual under the age of 21 years of age shall be allowed access to the premises.
  
3.     Employees: All employees and registered agents must be 21 years of age or older.
  
4.     Visitors: All visitors must be 21 years of age or older.

## **TREE BEARD, INC.**

### **POSITIVE IMPACT PLAN**

1. General: Tree Beard, Inc., is rooted in the community of New Bedford and intends to be a major resource and advocate for the economic empowerment of the City and its inhabitants. Tree Beard's positive impact plan is focused on benefiting the City of New Bedford and its inhabitants as they have been negatively impacted in the areas of median income, drug convictions, and substance abuse. As an area designated as disproportionately impacted, we will focus on promoting economic opportunity, assisting individuals and family members impacted by past drug convictions, and substance abuse prevention.

2. Compliance: Tree Beard shall adhere to all laws in fulfilling its positive impact plan, including, but not limited to the requirements set forth in 935 CMR 500.105(4) which provides the permitted and prohibited advertising, branding, marketing, and sponsorship practices of Marijuana Establishments. This plan, and all actions taken by Tree Beard, will not violate the Commission's regulations with respect to limitations on ownership or control or other applicable state laws. The progress or success of this plan will be demonstrated upon each license renewal period, commencing one year from provisional licensure.

3. Goals:

**I. Creating economic opportunity for the community.**

**II. Assisting individuals impacted directly and indirectly by past drug convictions.**

**III. Promoting wellness information, healthy lifestyles, and substance abuse prevention.**

4. Programs:

**I. Creating economic opportunity for the community.**

Tree Beard will create economic opportunity for the community directly through its hiring practices for employees and third-party vendors with a focus on hiring local New Bedford residents and businesses. Tree Beard seeks to hire 50% of its employees and third-party vendors from New Bedford. Tree Beard promotes full participation in the cannabis industry and intends to benefit the local New Bedford community and economy. Tree Beard will keep statistical data to ensure at least 50% of its employees and third-party vendors are from New Bedford.

As a fellow Economic Empowerment company, Tree Beard intends to expand upon its economic impact indirectly through programs designed to assist the local economy and Commission-designated Economic Empowerment applicants and Social Equity Program participants from New Bedford. We intend to assist individuals in entering the adult-use cannabis industry by reducing access barriers. Our hiring practices, community outreach, education seminars, training seminars, and volunteer training program will ensure increased economic opportunities in the adult-use cannabis industry is realized for residents of New Bedford and those who are designated as Economic Empowerment and Social Equity. Tree Beard will keep statistical

data to ensure at least its positive impact programs assist individuals from New Bedford and Commission-designated Economic Empowerment and Social Equity statuses. Tree Beard's ultimate intention is for 100% of its positive impact programs to assist individuals from New Bedford. We will be providing our time, skills, and finances towards promoting our own employee base as well as helping others seeking to enter the industry. Our owners and employees will work together on our initiatives to ensure our goals are met. The owners are members of the non-profit, the International Cannabis Physicians Association, currently seeking 501c3 approval. The Owners plan to continue volunteering and hosting educational seminars on cannabis in the City of New Bedford. The entity provides cannabis education on safe consumption, uses, history, home-growing, and industry specific workshops. These education and training seminars will be more frequent and industry specific upon licensure and funding. We intend to offer grants, training, and hands-on industry-space. Statistical data will be gathered to ensure at least 50% of our programs are reserved for individuals from New Bedford and other areas designated as disproportionately impacted by the Commission.

Tree Beard seeks to create economic opportunity indirectly by partnerships with local companies and organizations focusing on creating economic opportunities in the local community. The International Cannabis Physicians Association (ICPA) has agreed to be our partner and donee to promote small businesses and cannabis related businesses in our designated areas. Our goal is the ICPA will create a local "empowerment ecosystem" to allow new businesses to flourish with a focus on those in the cannabis related area. The ICPA will assist by providing grants, mentorship, equity funding, group clean-ups, substance abuse prevention, elderly and homelessness assistance, and fundraising initiatives.

## **II. Assisting individuals impacted directly and indirectly with past drug convictions.**

Tree Beard intends to assist individuals who have direct past drug convictions and their friends and families dealing with the collateral effects of those charges. Tree Beard intends to sponsor the local non-profit, Justice Bridge, affiliated with the University of Massachusetts School of Law, which provides low-moderate income individuals with access to justice. Tree Beard's Chief legal officer, Nicholas A. Gomes, Esq., is a participant of the Justice Bridge program and will continue on a limited basis to assist with cases regarding individuals dealing with issues from past drug convictions. Attorney Gomes has successfully held New Bedford's first expungement workshop focused on crimes associated with the war on drugs in September of 2019. Attorney Gomes will continue through Justice Bridge in providing legal services for expungement and sealing of criminal records with a focus on crimes associated with the war on drugs. Tree Beard will also seek to sponsor peer groups for assisting families and friends affected by past drug convictions. Tree Beard has not identified any peer groups assisting families and friends affected by past drug convictions, but will specifically engage the community for a sponsor peer group through the ICPA quarterly. Tree Beard will post quarterly advertisements in the local newspaper, The Standard Times, and engage in monthly online marketing promotions seeking Massachusetts residents who have past drug convictions for employment and sponsoring peer groups for such individuals and their families. Tree Beard seeks to hire 50% of its staff that are Massachusetts residents who have past drug-convictions or past drug-charges.

## **III. Promoting wellness, healthy lifestyles, and substance abuse prevention.**

Tree Beard will promote wellness, healthy lifestyles, and substance abuse prevention as priority initiatives. We are focusing on improving the lives of the people in our community and believe health is just as important as financial well-being. New Bedford was one of the hardest hit communities by economic inequality, illicit substance abuse, gang activity, and the opioid epidemic. Tree Beard believes promoting wellness and active lifestyles through sports and recreation is important to deter from illicit drug use. Tree Beard will be donating annually to the International Cannabis Physicians Association to assist in substance abuse education in an effort to teach younger generations of the dangers from illicit substance use.

Tree Beard will make further donations annually in its partnership with the International Cannabis Physicians Association (ICPA) to promote wellness, healthy lifestyles and substance abuse prevention in New Bedford will improve the community's well-being and ability to prosper. Tree Beard has performed three informational sessions through the International Cannabis Physicians Association in New Bedford thus far and will continue doing so as part of its positive impact plan. The ICPA provides cannabis advocacy and community outreach. Most recently, Dr. Kellie Roberge, from Tricann Alternatives of Maine, came to New Bedford to speak about the endocannabinoid system and opioid addiction. Tree Beard is also sponsoring the creation of a community room and wellness center located at 246 Union Street, New Bedford. The community room is open as a rotating local artist gallery with Zen Garden sessions for the general public and is expanding its offerings to include educational events and small-business work-space opportunities. Tree Beard's efforts in the community room will serve and help the residents of New Bedford in their wellness, healthy lifestyles, and substance abuse prevention. Tree Beard will keep statistical data to ensure its positive impact programs assist individuals from New Bedford at a high frequency to meet the needs of the community. Tree Beard's goal is to have 100% of its positive impact programs to assist individuals from New Bedford.

5. Reconciliation of Plan Success through Metrics:

Tree Beard will reconcile the success of its positive impact plan by performing quarterly reviews of company statistics, third-party publications, and personnel reports relative to all actions taken to reach the three goals. In an effort to fully understand the impact of Tree Beard's success, quality reporting from employees involved in effectuating the positive impact plan will be reviewed and recommendations implemented. The progress or success of its plan shall be documented upon renewal of its license each year, commencing upon one year from a provisional licensure. Tree Beard will secure letters from the organization detailing the donations made and volunteer hours spent a part of its metric of compliance and success of the Positive Impact Plan. Tree Beard's measurement metrics seek to identify the:

1. the value of economic opportunity created for the community including new employment and new businesses in the City;
2. the number and type of trainings, community outreach events, third-party sponsorships, and informational sessions pertaining to economic enrichment;
3. the number of successful drug convictions being sealed;

4. the number of support groups attended for individuals indirectly affected by past drug convictions;
5. the number of events and seminars held for promoting wellness information, industry employment, workforce development, healthy lifestyles, and substance abuse prevention; and