



## Massachusetts Cannabis Control Commission

### Marijuana Cultivator

#### General Information:

License Number: MC281254  
Original Issued Date: 01/07/2019  
Issued Date: 11/19/2020  
Expiration Date: 01/07/2022

### ABOUT THE MARIJUANA ESTABLISHMENT

Business Legal Name: Caregiver-Patient Connection

Phone Number: 978-621-3567 Email Address: dean@theconnection.community

Business Address 1: 295 Vernon Ave

Business Address 2:

Business City: Barre

Business State: MA

Business Zip Code: 01005

Mailing Address 1: 910 Boston Post Rd. E

Mailing Address 2: Ste 310

Mailing City: Marlborough

Mailing State: MA

Mailing Zip Code: 01752

### CERTIFIED DISADVANTAGED BUSINESS ENTERPRISES (DBES)

Certified Disadvantaged Business Enterprises (DBEs): Woman-Owned Business

### PRIORITY APPLICANT

Priority Applicant: yes

Priority Applicant Type: RMD Priority

Economic Empowerment Applicant Certification Number:

RMD Priority Certification Number: RPA201819

### RMD INFORMATION

Name of RMD: The Caregiver-Patient Connection

Department of Public Health RMD Registration Number: Provisional

Operational and Registration Status: Obtained Provisional Certificate of Registration only

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

If no, describe the circumstances below:

### PERSONS WITH DIRECT OR INDIRECT AUTHORITY

#### Person with Direct or Indirect Authority 1

Percentage Of Ownership: 16.25

Percentage Of Control: 25

Role: Manager

Other Role: Vice President

First Name: Dean

Last Name: Iandoli

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: 16.25

Percentage Of Control: 25

Role: Manager

Other Role: President

First Name: Catherine

Last Name: Trifilo

Suffix:

Gender: Female

User Defined Gender:

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

Specify Race or Ethnicity:

#### Person with Direct or Indirect Authority 3

Percentage Of Ownership: 16.25

Percentage Of Control: 25

Role: Manager

Other Role: CFO

First Name: Michael

Last Name: Staiti

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 4

Percentage Of Ownership: 16.25

Percentage Of Control: 25

Role: Manager

Other Role:

First Name: Richard

Last Name: Olstein

Suffix:

Gender: Male

User Defined Gender:

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

Specify Race or Ethnicity:

### ENTITIES WITH DIRECT OR INDIRECT AUTHORITY

No records found

### CLOSE ASSOCIATES AND MEMBERS

No records found

### CAPITAL RESOURCES - INDIVIDUALS

#### Individual Contributing Capital 1

First Name: Dean

Last Name: Iandoli

Suffix:

Types of Capital: Monetary/Equity,  
Land

Other Type of  
Capital:

Total Value of the Capital Provided:  
\$340000

Percentage of Initial Capital:  
37

Capital Attestation: Yes

#### Individual Contributing Capital 2

First Name: Catherine

Last Name: Trifilo

Suffix:

Types of Capital: Monetary/Equity,  
Land

Other Type of  
Capital:

Total Value of the Capital Provided:  
\$340000

Percentage of Initial Capital:  
37

Capital Attestation: Yes

#### Individual Contributing Capital 3

First Name: James

Last Name: Iandoli

Suffix:

Types of Capital: Monetary/Equity

Other Type of Capital:

Total Value of the Capital Provided: \$125000

Percentage of Initial Capital: 13

Date generated: 12/03/2020

Page: 2 of 9

Capital Attestation: Yes

#### Individual Contributing Capital 4

First Name: Joyce

Last Name: Iandoli

Suffix:

Types of Capital: Monetary/Equity Other Type of Capital: Total Value of the Capital Provided: \$125000 Percentage of Initial Capital: 13

Capital Attestation: Yes

#### CAPITAL RESOURCES - ENTITIES

No records found

#### BUSINESS INTERESTS IN OTHER STATES OR COUNTRIES

No records found

#### DISCLOSURE OF INDIVIDUAL INTERESTS

##### Individual 1

First Name: Dean

Last Name: Iandoli

Suffix:

Marijuana Establishment Name: Caregiver-Patient Connection LLC Business Type: Marijuana Retailer

Marijuana Establishment City: Fitchburg

Marijuana Establishment State: MA

##### Individual 2

First Name: Catherine

Last Name: Trifilo

Suffix:

Marijuana Establishment Name: Caregiver-Patient Connection LLC Business Type: Marijuana Retailer

Marijuana Establishment City: Fitchburg

Marijuana Establishment State: MA

##### Individual 3

First Name: Michael

Last Name: Staiti

Suffix:

Marijuana Establishment Name: Caregiver-Patient Connection LLC Business Type: Marijuana Retailer

Marijuana Establishment City: Fitchburg

Marijuana Establishment State:  
MA

##### Individual 4

First Name: Richard

Last Name: Olstein

Suffix:

Marijuana Establishment Name: Caregiver-Patient Connection LLC Business Type: Marijuana Retailer

Marijuana Establishment City: Fitchburg

Marijuana Establishment State: MA

##### Individual 5

First Name: Dean

Last Name: Iandoli

Suffix:

Marijuana Establishment Name: Caregiver-Patient Connection LLC Business Type: Marijuana Cultivator

Marijuana Establishment City: Barre

Marijuana Establishment State: MA

##### Individual 6

First Name: Catherine

Last Name: Trifilo

Suffix:

Marijuana Establishment Name: Caregiver-Patient Connection LLC Business Type: Marijuana Cultivator

Marijuana Establishment City: Barre

Marijuana Establishment State: MA

##### Individual 7

First Name: Michael

Last Name: Staiti

Suffix:

Marijuana Establishment Name: Caregiver-Patient Connection LLC Business Type: Marijuana Cultivator

Marijuana Establishment City: Barre

Marijuana Establishment State: MA

##### Individual 8

<b>First Name:</b> Richard	<b>Last Name:</b> Olstein	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Cultivator	
<b>Marijuana Establishment City:</b> Barre	<b>Marijuana Establishment State:</b> MA	

#### Individual 9

<b>First Name:</b> Dean	<b>Last Name:</b> Iandoli	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Cultivator	
<b>Marijuana Establishment City:</b> Framingham	<b>Marijuana Establishment State:</b> MA	

#### Individual 10

<b>First Name:</b> Catherine	<b>Last Name:</b> Trifilo	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Cultivator	
<b>Marijuana Establishment City:</b> Framingham	<b>Marijuana Establishment State:</b> MA	

#### Individual 11

<b>First Name:</b> Michael	<b>Last Name:</b> Staiti	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Cultivator	
<b>Marijuana Establishment City:</b> Framingham	<b>Marijuana Establishment State:</b> MA	

#### Individual 12

<b>First Name:</b> Richard	<b>Last Name:</b> Olstein	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Cultivator	
<b>Marijuana Establishment City:</b> Framingham	<b>Marijuana Establishment State:</b> MA	

#### Individual 13

<b>First Name:</b> Dean	<b>Last Name:</b> Iandoli	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Product Manufacture	
<b>Marijuana Establishment City:</b> Framingham	<b>Marijuana Establishment State:</b> MA	

#### Individual 14

<b>First Name:</b> Catherine	<b>Last Name:</b> Trifilo	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Product Manufacture	
<b>Marijuana Establishment City:</b> Framingham	<b>Marijuana Establishment State:</b> MA	

#### Individual 15

<b>First Name:</b> Michael	<b>Last Name:</b> Staiti	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Product Manufacture	
<b>Marijuana Establishment City:</b> Framingham	<b>Marijuana Establishment State:</b> MA	

#### Individual 16

<b>First Name:</b> Dean	<b>Last Name:</b> Iandoli	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Retailer	
<b>Marijuana Establishment City:</b> Sturbridge	<b>Marijuana Establishment State:</b> MA	

#### Individual 17

<b>First Name:</b> Catherine	<b>Last Name:</b> Trifilo	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Retailer	
<b>Marijuana Establishment City:</b> Sturbridge	<b>Marijuana Establishment State:</b> MA	

#### Individual 18

<b>First Name:</b> Michael	<b>Last Name:</b> Staiti	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Retailer	
<b>Marijuana Establishment City:</b> Sturbridge	<b>Marijuana Establishment State:</b> MA	

#### Individual 19

<b>First Name:</b> Richard	<b>Last Name:</b> Olstein	<b>Suffix:</b>
<b>Marijuana Establishment Name:</b> Caregiver-Patient Connection LLC	<b>Business Type:</b> Marijuana Retailer	
<b>Marijuana Establishment City:</b> Sturbridge	<b>Marijuana Establishment State:</b> MA	

#### MARIJUANA ESTABLISHMENT PROPERTY DETAILS

<b>Establishment Address 1:</b> 295 Vernon Avenue	
<b>Establishment Address 2:</b>	
<b>Establishment City:</b> Barre	<b>Establishment Zip Code:</b> 01005
<b>Approximate square footage of the Establishment:</b> 10000	<b>How many abutters does this property have?:</b> 15
<b>Have all property abutters have been notified of the intent to open a Marijuana Establishment at this address?:</b> Yes	
<b>Cultivation Tier:</b> Tier 02: 5,001 to 10,000 sq. ft.	<b>Cultivation Environment:</b> Outdoor

#### FEE QUESTIONS

**Cultivation Tier:** Tier 02: 5,001 to 10,000 sq. ft. **Cultivation Environment:** Outdoor

#### HOST COMMUNITY INFORMATION

Host Community Documentation:

Document Category	Document Name	Type	ID	Upload Date
Certification of Host Community Agreement	Attestation CHA signed copy.pdf	pdf	5ae109a07cc84f3628fdadfa	04/25/2018
Community Outreach Meeting Documentation	Community Outreach Attest Form Signed copy.pdf	pdf	5ae109fc47ddff7eac6628cb	04/25/2018
Plan to Remain Compliant with Local Zoning	CPC Plan to Remain Compliant with Local Zoning.pdf	pdf	5af0d97c4acea511a8368e4d	05/07/2018
Community Outreach Meeting Documentation	Community Outreach Notice Barre Gazette.pdf	pdf	5b72e6bf89bc002d9918a102	08/14/2018
Community Outreach Meeting Documentation	ComHostMtg Notice BOS TA.pdf	pdf	5b72e6d4cea8212d4c7b4ac2	08/14/2018
Community Outreach Meeting Documentation	ComHostMtg Notice TClerk.pdf	pdf	5b72e6dc5e9b3d2d528a70db	08/14/2018
Community Outreach Meeting Documentation	ComHostMtg Notice Town Boards.pdf	pdf	5b72e6e718807b2d67c3f737	08/14/2018
Community Outreach Meeting Documentation	communityoutreachnotice.pdf	pdf	5b72e6fb185bb22d7106573b	08/14/2018
Community Outreach Meeting Documentation	ComHostMtg Abutter CertReceipt.pdf	pdf	5b72e71189bc002d9918a106	08/14/2018

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.: \$1

#### PLAN FOR POSITIVE IMPACT

Plan to Positively Impact Areas of Disproportionate Impact:

Document Category	Document Name	Type	ID	Upload Date
Plan for Positive Impact	CPC-Plan to Pos Imp Areas of Disp Impact_Revised.pdf	pdf	5b871b744e62492d8f344f6b	08/29/2018

#### ADDITIONAL INFORMATION NOTIFICATION

Notification: I Understand

#### INDIVIDUAL BACKGROUND INFORMATION

##### Individual Background Information 1

Role:	Other Role:
First Name: Catherine	Last Name: Trifilo Suffix:
RMD Association: Not associated with an RMD	
Background Question: no	

##### Individual Background Information 2

Role:	Other Role:
First Name: Dean	Last Name: landoli 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
Secretary of Commonwealth - Certificate of Good Standing	Cert of Good Standing 4_18.pdf	pdf	5ad628b947ddff7eac6620b6	04/17/2018
Department of Revenue - Certificate of Good standing	Cert of Good Standing DOR.pdf	pdf	5ad628dce459990d85448af4	04/17/2018
Articles of Organization	CPC Articles of Organization 6_15_18.pdf	pdf	5b843d4bda72283955c60ff1	08/27/2018
Bylaws	CPC By Laws 8_18.pdf	pdf	5b843d7db60ce4391d87eff1	08/27/2018
Secretary of Commonwealth - Certificate of Good Standing	Cert of Good Standing SOS CPC 8_20.pdf	pdf	5b843dbb5a6f093923e50261	08/27/2018
Bylaws	CPC Letter CorpInfoUpdate.pdf	pdf	5b843de103a477392d0a3473	08/27/2018

Certificates of Good Standing:

Document Category	Document Name	Type	ID	Upload Date
Department of Revenue - Certificate of Good standing	8_30_20 LR- DOR Cert .pdf	pdf	5f8f4c4288d19a399a5ca59b	10/20/2020

Department of Unemployment Assistance - Certificate of Good standing	DUA Cert of Comp 9_2020.pdf	pdf	5f8f4c4e2e6b2a39ace12a03	10/20/2020
Secretary of Commonwealth - Certificate of Good Standing	8_30_20 LR SECY OF MA CERT.pdf	pdf	5f9341fb6e60eb07f57ef58a	10/23/2020

Massachusetts Business Identification Number: 001244437

Doing-Business-As Name: Local Roots

DBA Registration City:

### BUSINESS PLAN

Business Plan Documentation:

Document Category	Document Name	Type	ID	Upload Date
Plan for Liability Insurance	CPC Plan Insurance.pdf	pdf	5ad62b69b9c5f536005a6f49	04/17/2018
Business Plan	CPC Business Plan.pdf	pdf	5b3e6b155c57ce321fac4f1f	07/05/2018

### OPERATING POLICIES AND PROCEDURES

Policies and Procedures Documentation:

Document Category	Document Name	Type	ID	Upload Date
Inventory procedures	CPC-Inventory procedures.pdf	pdf	5b453d8db0153b3eaf4b3999	07/10/2018
Qualifications and training	CPC-Qualifications and training.pdf	pdf	5b453dd685e0cc3ea5b900e1	07/10/2018
Restricting Access to age 21 and older	CPC-Restricting access to age 21 and older.pdf	pdf	5b453df54b1b3a3ec37eb2ac	07/10/2018
Separating recreational from medical operations, if applicable	CPC-Separating medical use from adult use.pdf	pdf	5b453e0ece21983ed7e3fc65	07/10/2018
Storage of marijuana	CPC-Storage of marijuana.pdf	pdf	5b453e1c228a4c3e9f187ca8	07/10/2018
Dispensing procedures	CPC Dispensing Revised.pdf	pdf	5b84425f5a6f093923e5026b	08/27/2018
Dispensing procedures	Letter Dispensing.pdf	pdf	5b844276da72283955c60ffd	08/27/2018
Maintaining of financial records	CPC-Maintaining of Financial Records Revised 2_19.pdf	pdf	5db73db290352a2b339ae0fe	10/28/2019
Personnel policies including background checks	CPC-Personnel Policies Including Background Checks Revised 8_13.pdf	pdf	5db73ddbbba9d562b3e0324b9	10/28/2019
Policies and Procedures for cultivating.	CPC-Policies and Procedures for Cultivating Revised 8_28_19.pdf	pdf	5db73dee51e4622fd806b534	10/28/2019
Prevention of diversion	CPC Prevention of Diversion Plan Revised 8_13.pdf	pdf	5db73e02b35b62300f5d9a10	10/28/2019
Quality control and testing	CPC-Quality Control and Testing Procedures Revised 9_2.pdf	pdf	5db73e1851e4622fd806b538	10/28/2019
Record Keeping procedures	CPC-Record Keeping Revised 2_19.pdf	pdf	5db73e2d90352a2b339ae104	10/28/2019
Security plan	CPC-Security Plan Barre Revised 8_19.pdf	pdf	5db73e46ec4af12b5426bd10	10/28/2019
Transportation of marijuana	CPC-Transportation of Marijuana REVISED 8_6_19.pdf	pdf	5db73e5d4b00122fe399fb05	10/28/2019
Diversity plan	CPC Diversity Plan Barre rev	pdf	5dbc3759482d5f46ef32fcc5	11/01/2019

10_28_19.pdf				
Energy Compliance Plan	CPC Barre Outdoor Energy Compliance Response.pdf	pdf	5f8f4dd26cf7c8390bb99cd0	10/20/2020

## 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 Agree

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 Agree

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

## ADDITIONAL INFORMATION NOTIFICATION

Notification: I Understand

## COMPLIANCE WITH POSITIVE IMPACT PLAN

### Progress or Success Goal 1

Description of Progress or Success: Progress

As CPC operations have grown, the company has adopted its' corporate-wide Positive Impact Plan to focus on the city of Fitchburg, MA through targeted hiring of residents of that community and annual charitable donations to local causes. The Impact Plan has been instituted and is being rolled out as each of CPC's facilities receive their FCR and become operational with the need for staffing.

CPC received its' Final Certificate of Registration (FCR) from the Commission on June 26, 2019 to operate as a Tier II Outdoor cultivator. During the past year, in accordance with our Impact Plan, CPC has held job fair in Fitchburg and has made a donation to the United Way of Fitchburg for \$5,000 donation to help fund a pilot program designed to assist Fitchburg residents economic literacy program to be launched in spring 2020 as well as a \$5,000.00 donation to the Twin Cities Rail Trail Association, a Fitchburg charity currently building an inter-city outdoor walking/biking path.

The Fitchburg specific job fair was held at the CPC/Local Roots dispensary location located at 371 Lunenburg St., in Fitchburg.

Currently, Local Roots is hosting the third round of local artwork in their Fitchburg dispensary.

Please see supporting documentation.

## COMPLIANCE WITH DIVERSITY PLAN

### Diversity Progress or Success 1

Description of Progress or Success: Progress

As CPC operations have grown the company has adopted a company-wide Diversity Plan with the main goal of women comprising 50% of the company's total workforce.

Currently, women comprise a total of 62.5% of all CPC employees. CPC has exceeded its' goal by 12.5%. Additionally, the following managerial positions are held by women:

Cultivation Director of Operations  
Dispensary General Manager  
Dispensary Assistant General Manager

Please see supporting documents.

#### HOURS OF OPERATION

Monday From: 8:00 AM	Monday To: 5:00 PM
Tuesday From: 8:00 AM	Tuesday To: 5:00 PM
Wednesday From: 8:00 AM	Wednesday To: 5:00 PM
Thursday From: 8:00 AM	Thursday To: 5:00 PM
Friday From: 8:00 AM	Friday To: 5:00 PM
Saturday From: 8:00 AM	Saturday To: 12:00 PM
Sunday From: Closed	Sunday To: Closed

## 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

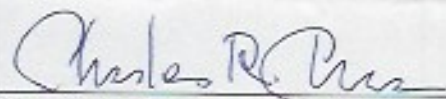
I, Dean Tondoli, (insert name) certify as an authorized representative of The Caregiver-Patient Connection (insert name of applicant) that the applicant has executed a host community agreement with the Town of Barre (insert name of host community) pursuant to G.L.c. 94G § 3(d) on April 2, 2018 (insert date).



Signature of Authorized Representative of Applicant

### Host Community

I, Charles Chase, (insert name) certify that I am the contracting authority or have been duly authorized by the contracting authority for Town of Barre (insert name of host community) to certify that the applicant and Town of Barre (insert name of host community) has executed a host community agreement pursuant to G.L.c. 94G § 3(d) on April 2, 2018 (insert date).



Signature of Contracting Authority or  
Authorized Representative of Host Community

## 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, Dean Iandoli, (*insert name*) attest as an authorized representative of The Caregiver-Patient Connection (*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 Saturday March 31, 2018 (*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 March 22, 2018 (*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 March 20, 2018 (*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 March 20, 2018 (*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*).

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.



THE CAREGIVER • PATIENT CONNECTION

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

The Caregiver Patient Connection Inc.'s (CPC's) proposed location for marijuana cultivation and marijuana product manufacturing is 295 Vernon Ave., Barre, MA (Located within the Quabbin Renewable Energy Industrial Park, is in an Industrial Zoning District. Pursuant to Section 140-10 of the Town of Barre Zoning By-Laws, "farming", "Greenhouses", "horticulture", "manufacturing" and "processing" are "Permitted Uses" under Section 140-10 of the Code. In a letter dated April 3, 2017, the Barre Chief Code Enforcement Officer/Building Inspector, verified that the proposed property is zoned for the proposed activities. The proposed building site complies with the requirements set forth in 935CMR500.110(3).

**NOTICE OF  
COMMUNITY  
OUTREACH MEETING  
REGARDING  
ADULT-USE  
MARIJUANA  
ESTABLISHMENT  
CAREGIVER -PATIENT  
CONNECTION, INC.  
295 VERNON AVENUE  
(AKA 295 VERNON  
AVENUE, #5)  
BARRE, MA**

Notice is hereby given that the Caregiver- Patient Connection, Inc. of 287 Chapman Road, Barre, Massachusetts will conduct a Community Outreach Meeting on the following matter on **March 31, 2018** in the **Barre Town Hall, 2 Exchange Street, Barre, MA** at **1:00pm**. The Caregiver- Patient Connection, Inc. intends to apply for one or more of the following Adult-use Marijuana Establishment licenses: Marijuana Cultivator; Marijuana Product Manufacturer; at 295 Vernon Avenue, Barre, Massachusetts (AKA 295 Vernon Avenue #5), pursuant to MGL Ch. 94 G and Chapter 55 of the Acts of 2017, other applicable laws and regulations promulgated thereunder, including those promulgated thereunder by the Massachusetts Cannabis Control Commission. Caregiver-Patient Connection will not seek a retail Adult-use Marijuana license in Barre, MA.

Information presented at the community outreach hearing will include, but not be limited to:

1. The type(s) of Adult-use Marijuana Establishment to be located at the proposed address;

2. Information ade-

quate to demonstrate that the Adult – use Marijuana Establishment location will be maintained securely;

3. Steps to be taken by the Adult-use Marijuana Establishment to prevent diversion to minors;

4. A plan by the Marijuana Establishment to positively impact the community; and

5. Information adequate to demonstrate that the location will not constitute a nuisance as defined by law; and

6. Community members will be permitted and are encouraged to ask questions and receive answer from representatives of Caregiver-Patient Connection, Inc;

A copy of this notice is on file with the Town Clerk, at the Board of Selectmen's office, and the Planning Board office, all located at the Henry Woods Building, 40 West Street, Barre, MA and a copy of this Notice was mailed at least seven calendar days prior to the community outreach meeting to abutters of the proposed address of the Marijuana Establishment, owners of land directly opposite on any public or private street or way, and abutters to the abutters within three hundred 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.

**Caregiver -Patient  
Connection, Inc.**  
Catherine Trifilo  
President

3/22/18

RECEIVED

MAR 20 2018

**NOTICE OF COMMUNITY OUTREACH MEETING  
REGARDING ADULT-USE MARIJUANA ESTABLISHMENT**

TOWN OF BARRE, MA  
SELECTMEN / TOWN ADMINISTRATOR

**CAREGIVER -PATIENT CONNECTION, INC.  
295 VERNON AVENUE (AKA 295 VERNON AVENUE, #5) BARRE, MA**

Notice is hereby given that the Caregiver- Patient Connection, Inc. of 287 Chapman Road, Barre, Massachusetts will conduct a Community Outreach Meeting on the following matter on **March 31, 2018 in the Barre Town Hall, 2 Exchange Street, Barre, MA at 1:00pm**. The Caregiver-Patient Connection, Inc. intends to apply for one or more of the following Adult-use Marijuana Establishment licenses: Marijuana Cultivator; Marijuana Product Manufacturer; at 295 Vernon Avenue, Barre, Massachusetts (AKA 295 Vernon Avenue #5), pursuant to MGL Ch. 94 G and Chapter 55 of the Acts of 2017, other applicable laws and regulations promulgated thereunder, including those promulgated thereunder by the Massachusetts Cannabis Control Commission. **Caregiver-Patient Connection will not seek a retail Adult-use Marijuana license in Barre, MA.**

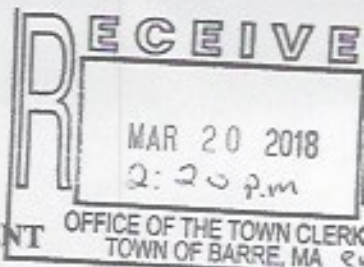
Information presented at the community outreach hearing will include, but not be limited to:

1. The type(s) of Adult-use Marijuana Establishment to be located at the proposed address;
2. Information adequate to demonstrate that the Adult - use Marijuana Establishment location will be maintained securely;
3. Steps to be taken by the Adult-use Marijuana Establishment to prevent diversion to minors;
4. A plan by the Marijuana Establishment to positively impact the community; and
5. Information adequate to demonstrate that the location will not constitute a nuisance as defined by law; and
6. Community members will be permitted and are encouraged to ask questions and receive answer from representatives of Caregiver-Patient Connection, Inc;

A copy of this notice is on file with the Town Clerk, at the Board of Selectmen's office, and the Planning Board office, all located at the Henry Woods Building, 40 West Street, Barre, MA and a copy of this Notice was mailed at least seven calendar days prior to the community outreach meeting to abutters of the proposed address of the Marijuana Establishment, owners of land directly opposite on any public or private street or way, and abutters to the abutters within three hundred 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.

Caregiver -Patient Connection, Inc.

Catherine Trifilo  
President



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REGARDING ADULT-USE MARIJUANA ESTABLISHMENT  
CAREGIVER-PATIENT CONNECTION, INC.  
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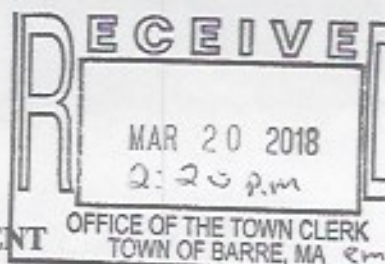
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President

## SENDER: COMPLETE THIS SECTION

- Complete items 1, 2, and 3.  
 ■ Print your name and address on the reverse so that we can return the card to you.  
 ■ Attach this card to the back of the mailpiece, or on the front if space permits.

1. Article Addressed to:

STB Real Estate  
 P.O. Box 162  
 S. Bern, MA 01074



9590 9403 0139 5077 3897 35

2. Article Number (Transfer from service label)

7017 1070 0000 4351 4941

PS Form 3811, April 2015 PSN 7530-02-000-9053

## SENDER: COMPLETE THIS SECTION

- Complete items 1, 2, and 3.  
 ■ Print your name and address on the reverse so that we can return the card to you.  
 ■ Attach this card to the back of the mailpiece, or on the front if space permits.

Article Addressed to:

Comm of MA  
 Office of Veterans Affairs  
 251 Century St  
 Boston, MA 02114



9590 9403 0139 5077 3895 99

Article Number (Transfer from service label)

117 1070 0000 4351 4972

## COMPLETE THIS SECTION ON DELIVERY

- A. Signature ☒ Agent  
 B. Received by (Printed Name) ☒ Address  
 S. Bern, MA 01074  
 C. Date of Delivery  
 3-28-14  
 D. Is delivery address different from item 1? ☒ Yes  
 If YES, enter delivery address below: ☐ No

3. Service Type  
☐ Adult Signature Restricted Delivery  
☐ Adult Signature Restricted Delivery  
☐ Certified Mail  
☐ Certified Mail Restricted Delivery  
☐ Collect on Delivery  
☐ Collect on Delivery Restricted Delivery  
☐ Insured Mail  
☐ Insured Mail Restricted Delivery (over \$500)
- ☐ Priority Mail Express  
☐ Registered Mail  
☐ Registered Mail Restricted Delivery  
☐ Return Receipt for Merchandise  
☐ Signature Confirmation  
☐ Signature Confirmation Restricted Delivery

Domestic Return Receipt

## COMPLETE THIS SECTION ON DELIVERY

- A. Signature ☒ Agent  
 B. Received by (Printed Name) ☒ Address  
 3-22-18  
 C. Date of Delivery  
 3-22-18  
 D. Is delivery address different from item 1? ☐ Yes  
 If YES, enter delivery address below: ☐ No

3. Service Type  
☐ Adult Signature Restricted Delivery  
☐ Adult Signature Restricted Delivery  
☐ Certified Mail  
☐ Certified Mail Restricted Delivery  
☐ Collect on Delivery  
☐ Collect on Delivery Restricted Delivery  
☐ Insured Mail  
☐ Insured Mail Restricted Delivery (over \$500)
- ☐ Priority Mail Express  
☐ Registered Mail  
☐ Registered Mail Restricted Delivery  
☐ Return Receipt for Merchandise  
☐ Signature Confirmation  
☐ Signature Confirmation Restricted Delivery

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 ■ Print your name and address on the reverse so that we can return the card to you.  
 ■ Attach this card to the back of the mailpiece, or on the front if space permits.

1. Article Addressed to:

Roman Catholic Order of Lk  
 188 Vernon Ave/P.O. Box  
 S. Bern, MA 01074



9590 9403 0139 5077 3896 74

2. Article Number (Transfer from service label)

117 1070 0000 4351 4880

PS Form 3811, April 2015 PSN 7530-02-000-9053

## SENDER: COMPLETE THIS SECTION

- Complete items 1, 2, and 3.  
 ■ Print your name and address on the reverse so that we can return the card to you.  
 ■ Attach this card to the back of the mailpiece, or on the front if space permits.

Article Addressed to:

Resume Center  
 P.O. Box 1450  
 Chicago, IL 60690



9590 9403 0139 5077 3896 81

Article Number (Transfer from service label)

117 1070 0000 4351 4873

## COMPLETE THIS SECTION ON DELIVERY

- A. Signature ☒ Agent  
 B. Received by (Printed Name) ☒ Address  
 James Lopez  
 3-26-14  
 C. Date of Delivery  
 3-26-14  
 D. Is delivery address different from item 1? ☐ Yes  
 If YES, enter delivery address below: ☐ No

3. Service Type  
☐ Adult Signature Restricted Delivery  
☐ Adult Signature Restricted Delivery  
☐ Certified Mail  
☐ Certified Mail Restricted Delivery  
☐ Collect on Delivery  
☐ Collect on Delivery Restricted Delivery  
☐ Insured Mail  
☐ Insured Mail Restricted Delivery (over \$500)
- ☐ Priority Mail Express  
☐ Registered Mail  
☐ Registered Mail Restricted Delivery  
☐ Return Receipt for Merchandise  
☐ Signature Confirmation  
☐ Signature Confirmation Restricted Delivery

Domestic Return Receipt

## COMPLETE THIS SECTION ON DELIVERY

- A. Signature ☒ Agent  
 B. Received by (Printed Name) ☒ Address  
 HICK T 6225 E  
 3-26-14  
 C. Date of Delivery  
 3-26-14  
 D. Is delivery address different from item 1? ☐ Yes  
 If YES, enter delivery address below: ☐ No

3. Service Type  
☐ Adult Signature Restricted Delivery  
☐ Adult Signature Restricted Delivery  
☐ Certified Mail  
☐ Certified Mail Restricted Delivery  
☐ Collect on Delivery  
☐ Collect on Delivery Restricted Delivery  
☐ Insured Mail  
☐ Insured Mail Restricted Delivery (over \$500)
- ☐ Priority Mail Express  
☐ Registered Mail  
☐ Registered Mail Restricted Delivery  
☐ Return Receipt for Merchandise  
☐ Signature Confirmation  
☐ Signature Confirmation Restricted Delivery

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 ■ Attach this card to the back of the mailpiece, or on the front if space permits.

1. Article Addressed to:

Richard Neve  
 336 Union Ave/Box 169  
 S. Barn, MA 01074



9590 9403 0139 5077 3897 80

2. Article Number (Transfer from service label)

017 1070 0000 4351 4897

PS Form 3811, April 2015 PSN 7530-02-000-9063

## SENDER: COMPLETE THIS SECTION

- Complete items 1, 2, and 3.  
 ■ Print your name and address on the reverse so that we can return the card to you.  
 ■ Attach this card to the back of the mailpiece, or on the front if space permits.

1. Article Addressed to:

R.T. Curti Inc  
 3 Belcher St  
 Plainville, MA 02762



9590 9403 0139 5077 3896 98

2. Article Number (Transfer from service label)

017 1070 0000 4351 4896

## COMPLETE THIS SECTION ON DELIVERY

- A. Signature [Signature] ☐ Agent  
 B. Received by (Printed Name) [Signature] ☐ Addressee  
 C. Date of Delivery 3-24-15  
 D. Is delivery address different from item 1? ☐ Yes  
 If YES, enter delivery address below: No

3. Service Type

- ☐ Adult Signature  
☐ Adult Signature Restricted Delivery  
☐ Certified Mail  
☐ Certified Mail Restricted Delivery  
☐ Collect on Delivery  
☐ Collect on Delivery Restricted Delivery  
☐ Insured Mail  
☐ Insured Mail Restricted Delivery (over \$500)
- ☐ Priority Mail Express®  
☐ Registered Mail™  
☐ Registered Mail Restricted Delivery  
☐ Return Receipt for Merchandise  
☐ Signature Confirmation™  
☐ Signature Confirmation Restricted Delivery

## COMPLETE THIS SECTION ON DELIVERY

- A. Signature [Signature] ☐ Agent  
 B. Received by (Printed Name) [Signature] ☐ Addressee  
 C. Date of Delivery 3/20/15  
 D. Is delivery address different from item 1? ☐ Yes  
 If YES, enter delivery address below: No

3. Service Type

- ☐ Adult Signature  
☐ Adult Signature Restricted Delivery  
☐ Certified Mail  
☐ Certified Mail Restricted Delivery  
☐ Collect on Delivery  
☐ Collect on Delivery Restricted Delivery  
☐ Insured Mail  
☐ Insured Mail Restricted Delivery (over \$500)
- ☐ Priority Mail Express®  
☐ Registered Mail™  
☐ Registered Mail Restricted Delivery  
☐ Return Receipt for Merchandise  
☐ Signature Confirmation™  
☐ Signature Confirmation Restricted Delivery

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1. Article Addressed to:

Nancy Brown  
 Cole Place Tryst  
 530 Valley Rd  
 Barn, MA 01005



9590 9403 0139 5077 3897 11

2. Article Number (Transfer from service label)

017 1070 0000 4351 4965

PS Form 3811, April 2015 PSN 7530-02-000-9063

## SENDER: COMPLETE THIS SECTION

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 ■ Print your name and address on the reverse so that we can return the card to you.  
 ■ Attach this card to the back of the mailpiece, or on the front if space permits.

1. Article Addressed to:

John Curti  
 P.O. Box 207  
 Wheelwright, MA 01084



9590 9403 0139 5077 3897 66

2. Article Number (Transfer from service label)

017 1070 0000 4351 4910

## COMPLETE THIS SECTION ON DELIVERY

- A. Signature [Signature] ☐ Agent  
 B. Received by (Printed Name) [Signature] ☐ Addressee  
 C. Date of Delivery 3/23/2015  
 D. Is delivery address different from item 1? ☐ Yes  
 If YES, enter delivery address below: No

3. Service Type

- ☐ Adult Signature  
☐ Adult Signature Restricted Delivery  
☐ Certified Mail  
☐ Certified Mail Restricted Delivery  
☐ Collect on Delivery  
☐ Collect on Delivery Restricted Delivery  
☐ Insured Mail  
☐ Insured Mail Restricted Delivery (over \$500)
- ☐ Priority Mail Express®  
☐ Registered Mail™  
☐ Registered Mail Restricted Delivery  
☐ Return Receipt for Merchandise  
☐ Signature Confirmation™  
☐ Signature Confirmation Restricted Delivery

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- A. Signature [Signature] ☐ Agent  
 B. Received by (Printed Name) [Signature] ☐ Addressee  
 C. Date of Delivery 3/23/2015  
 D. Is delivery address different from item 1? ☐ Yes  
 If YES, enter delivery address below: No

3. Service Type

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☐ Adult Signature Restricted Delivery  
☐ Certified Mail  
☐ Certified Mail Restricted Delivery  
☐ Collect on Delivery  
☐ Collect on Delivery Restricted Delivery  
☐ Insured Mail  
☐ Insured Mail Restricted Delivery (over \$500)
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1. Article Addressed to:

Heather Medion  
330 Vernon Ave/PO Box 436  
S. Berre, MA 01674

9590 9403 0139 5077 3897 42

2. Article Number (Transfer from service label)

7017 1070 0000 4351 4934

PS Form 3811, April 2015 PSN 7530-02-000-9053

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1. Article Addressed to:

Lee Anne Branch  
62 Whitman Rd  
Warehite, MA 01669

9590 9403 0139 5077 3896 12

2. Article Number (Transfer from service label)

7017 1070 0000 4351 4781

## COMPLETE THIS SECTION ON DELIVERY

- A. Signature [Signature] ☒ Agent ☐ Addressee
- B. Received by (Printed Name) Heather Medion C. Date of Delivery 3-22-18
- D. Is delivery address different from item 1? ☒ Yes ☐ No  
If YES, enter delivery address below:

3. Service Type
- ☐ Adult Signature ☐ Registered Mail™ ☐ Registered Mail Restricted Delivery
- ☐ Certified Mail® ☐ Return Receipt for Merchandise
- ☐ Collect on Delivery ☐ Signature Confirmation™
- ☐ Insured Mail ☐ Signature Confirmation™ Restricted Delivery
- ☐ Insured Mail Restricted Delivery (over \$500)

Domestic Return Receipt

## COMPLETE THIS SECTION ON DELIVERY

- A. Signature [Signature] ☒ Agent ☐ Addressee
- B. Received by (Printed Name) Michael Branch C. Date of Delivery 3-22-18
- D. Is delivery address different from item 1? ☐ Yes ☒ No  
If YES, enter delivery address below:

3. Service Type
- ☐ Adult Signature ☐ Registered Mail™ ☐ Registered Mail Restricted Delivery
- ☐ Certified Mail® ☐ Return Receipt for Merchandise
- ☐ Collect on Delivery ☐ Signature Confirmation™
- ☐ Insured Mail ☐ Signature Confirmation™ Restricted Delivery
- ☐ Insured Mail Restricted Delivery (over \$500)

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1. Article Addressed to:

David Richard  
48 Vernon Ave  
Berre, MA 01665

9590 9403 0139 5077 3896 29

2. Article Number (Transfer from service label)

7017 1070 0000 4351 4477

PS Form 3811, April 2015 PSN 7530-02-000-9053

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1. Article Addressed to:

Town of Berre  
40 West St  
Berre, MA 01665

9590 9403 0139 5077 3897 04

2. Article Number (Transfer from service label)

7017 1070 0000 4351 4958

## COMPLETE THIS SECTION ON DELIVERY

- A. Signature [Signature] ☒ Agent ☐ Addressee
- B. Received by (Printed Name) David Richard C. Date of Delivery 3/22/18
- D. Is delivery address different from item 1? ☐ Yes ☒ No  
If YES, enter delivery address below:

3. Service Type
- ☐ Adult Signature ☐ Registered Mail™ ☐ Registered Mail Restricted Delivery
- ☐ Certified Mail® ☐ Return Receipt for Merchandise
- ☐ Collect on Delivery ☐ Signature Confirmation™
- ☐ Insured Mail ☐ Signature Confirmation™ Restricted Delivery
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Domestic Return Receipt

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- A. Signature [Signature] ☒ Agent ☐ Addressee
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If YES, enter delivery address below:

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- ☐ Certified Mail® ☐ Return Receipt for Merchandise
- ☐ Collect on Delivery ☐ Signature Confirmation™
- ☐ Insured Mail ☐ Signature Confirmation™ Restricted Delivery
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1. Article Addressed to:

Comm of Mdt  
Comm of Environment  
251 Courtenay St  
Boston, MA 02114



9590 9403 0139 5077 3896 05

2. Article Number (transfer from service label)

7017 1070 0000 4351 4989

**COMPLETE THIS SECTION ON DELIVERY**

A. Signature ☒ Agent ☐ Addressee  
*X [Signature]*

B. Received by (Printed Name) C. Date of Delivery  
*[Signature]* 3-27-8

D. Is delivery address different from item 1? ☐ Yes ☐ No  
If YES, enter delivery address below:

3. Service Type
- ☐ Adult Signature
  - ☐ Adult Signature Restricted Delivery
  - ☐ Certified Mail
  - ☐ Certified Mail Restricted Delivery
  - ☐ Collect on Delivery
  - ☐ Collect on Delivery Restricted Delivery
  - ☐ Insured Mail
  - ☐ Insured Mail Restricted Delivery
  - ☐ Insured Mail over \$500
  - ☐ Priority Mail Express
  - ☐ Registered Mail
  - ☐ Registered Mail Restricted Delivery
  - ☐ Return Receipt for Merchandise
  - ☐ Signature Confirmation
  - ☐ Signature Confirmation Restricted Delivery

# USPS Tracking®

[FAQs > \(http://faq.usps.com/?articleId=220900\)](http://faq.usps.com/?articleId=220900)

## Track Another Package +

Rose Sabol  
350 Vernon Ave / P.O. Box 525, Barre, MA

**Tracking Number:** 70171070000043514903

Remove X

Your item could not be delivered on April 12, 2018 at 3:05 pm in BARRE, MA 01005. It was held for the required number of days and is being returned to the sender.

## Alert

April 12, 2018 at 3:05 pm  
Unclaimed/Being Returned to Sender  
BARRE, MA 01005

Get Updates ✓

---

Text & Email Updates



---

Tracking History



**April 12, 2018, 3:05 pm**

Unclaimed/Being Returned to Sender  
BARRE, MA 01005

Your item could not be delivered on April 12, 2018 at 3:05 pm in BARRE, MA 01005.  
It was held for the required number of days and is being returned to the sender.

Reminder to Schedule Redelivery of your item

**March 21, 2018, 8:27 am**Notice Left (No Authorized Recipient Available)  
BARRE, MA 01005**March 21, 2018, 7:21 am**Arrived at Unit  
BARRE, MA 01005**March 21, 2018, 4:37 am**Departed USPS Regional Facility  
SPRINGFIELD MA NETWORK DISTRIBUTION CENTER**March 21, 2018, 3:24 am**Arrived at USPS Regional Facility  
SPRINGFIELD MA NETWORK DISTRIBUTION CENTER**March 21, 2018, 1:34 am**Departed USPS Regional Facility  
SPRINGFIELD MA NETWORK DISTRIBUTION CENTER**March 21, 2018, 1:33 am**Arrived at USPS Regional Facility  
SPRINGFIELD MA NETWORK DISTRIBUTION CENTER**March 20, 2018, 4:33 pm**Departed Post Office  
SOUTH BARRE, MA 01074**March 20, 2018, 4:18 pm**USPS in possession of item  
SOUTH BARRE, MA 01074

Hi Dean,

I did receive your message. At this time, we have not found any record of costs that your establishments have incurred to the Town of Barre.

All the best,

**Jessica Sizer, M.P.P.**

*Town Administrator*

*Town of Barre*

*40 West Street Suite 697*

*Barre, MA 01005*

Direct: 978-355-2504 x101

Cell: 413-284-2334

Fax: 978-355-5023



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**From:** Dean Iandoli <[dean@theconnection.community](mailto:dean@theconnection.community)>

**Date:** Monday, October 19, 2020 at 3:15 PM

**To:** "[jsizer@townofbarre.com](mailto:jsizer@townofbarre.com)" <[jsizer@townofbarre.com](mailto:jsizer@townofbarre.com)>

**Cc:** Matthew Urban <[murban@townofbarre.com](mailto:murban@townofbarre.com)>, Greg O'Sullivan

<[gosullivan@townofbarre.com](mailto:gosullivan@townofbarre.com)>, "[dclark@townofbarre.com](mailto:dclark@townofbarre.com)" <[dclark@townofbarre.com](mailto:dclark@townofbarre.com)>

**Subject:** Cannabis Control Commission required document

Hello Jessica:

The Cannabis Control Commission, as part of their annual re-licensing of marijuana establishments, requires that the license holder reaches out to its' host community in order to get an itemized record of any costs of the marijuana establishment to the city or town (See below). This is a newer requirement in the licensing process and is most likely a result of the New Bedford (and other municipalities) HCA issues.

**Cannabis Control Commission Municipal Cost Documentation**

*Please upload documentation demonstrating that the licensee requested from the host community records of any cost to the city or town reasonably related to the operation of the establishment. The host community costs can include actual and anticipated costs associated with the operation of the establishment. Additionally, please include the host community's response, or if no response was provided, a letter from the licensee attesting that they did not receive a response.*

I am sure this is something you will need to discuss this with the Selectmen. Please advise if you, or they have any questions. I am hopeful you can respond to this request by the 25<sup>th</sup> of October.

If you have any questions please do not hesitate to contact me.

Thank-You,

Dean

Dean Iandoli

Founder/Managing Partner

CAREGIVER-PATIENT CONNECTION –  
Plan to Positively Impact Areas of Disproportionate Impact

***Introduction***

The Cannabis Control Commission (“Commission”) has identified certain communities in Massachusetts as areas of disproportionate impact. Although Barre, Massachusetts is not one of those communities, Caregiver-Patient Connection’s (“CPC”) cultivation marijuana establishment will be located within approximately thirty miles of three such communities: 1) Fitchburg (~27 miles); 2) Monson (~28 miles); and 3) Spencer (~18 miles) (collectively, the “Impacted Communities”). Accordingly, CPC’s ability to positively impact the Impacted Communities may be challenged because of the significant distances between Barre and these communities. Nevertheless, CPC will exert best efforts to provide access, foster inclusivity, and broadcast opportunities to the residents of these communities. CPC aspires to educate, empower and engage these groups of individuals and remove existing barriers to entry in the adult-use cannabis industry.

***Positive Impact Goals***

CPC will positively impact the Central Massachusetts by providing employment opportunities and training through real-world experience, to residents of the Impacted Communities with the ultimate goal of providing opportunities for advancement in the nascent adult-use cannabis industry. More specifically, CPC will target for employment opportunities residents of the Impacted Communities who have past marijuana-related drug convictions (to the extent permitted by law and Commission regulations) and/or parents or spouses with drug convictions. CPC believes that directing its hiring efforts at these previously marginalized communities in Central Massachusetts will ensure that the expected prosperity from the burgeoning adult-use cannabis industry in the state will benefit and lift residents from all walks of life and backgrounds.

***Positive Impact Programs***

CPC will employ a twofold approach to attracting qualified candidates from Impacted Communities. With respect to staffing and employment opportunities, CPC intends to give hiring preference to qualified applicants who are residents of the Impacted Communities and/or who have marijuana-related CORIs and/or parents or spouses with drug convictions. To achieve this goal CPC intends to identify community organizations in Central Massachusetts including veteran’s administrations, to assist the company in identifying residents of the affected communities with employment opportunities. Either independently, or in partnership with its community partner(s), CPC will regularly participate at job fairs in Central Massachusetts (and, more specifically, job fairs within the Impacted Communities if applicable) in order to identify and recruit residents of the Impacted Communities who have an interest in the adult-use cannabis industry.

In addition to its dedicated community outreach efforts, CPC will create an internship training program during the first 2 years of operation of its Barre cultivation facility, where a limited number of skilled entry-level positions will be made available to a diverse pool of Central Massachusetts applicants, with specific priority given to residents of Impacted Communities.

CAREGIVER-PATIENT CONNECTION –  
Plan to Positively Impact Areas of Disproportionate Impact

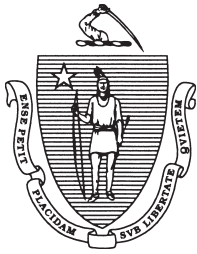
The internship program will be used to educate and train Central Massachusetts residents who otherwise lack experience in the adult-use cannabis industry with the expectation that, upon completion of the program, interns will possess the job skills and experience to secure gainful employment at any adult-use cannabis facility within the Commonwealth. To bolster its internship program, CPC may also seek a partnership with Fitchburg State College's Career Center in order to identify local students interested in employment in the adult-use cannabis industry and, more specifically, cannabis cultivation processes. CPC's internship program will be reevaluated annually based on staffing capacity and needs, with the expectation that the program will grow proportionally with the company.

Additionally, although the host community of the CPC cultivation facility, Barre, is not recognized as an area of disproportionate impact, CPC has committed, upon receiving all state and local licenses and permits, to purchasing a transportation van to be donated to the Barre Council on Aging. This van is desperately needed in order to facilitate the transportation of seniors aging in place in extremely rural areas with very little, or no public transportation to the Barre senior center for social activities, programs and wellness programs. Catherine Trifilo, the President of CPC, has volunteered as a Meals on Wheels driver and has earned her Master's degree in Gerontology from the University of Southern California. It will be CPC's goal to continue to provide positive impacts to local senior programs in the future.

***Positive Impact Measurement***

CPC is committed to becoming a community pillar in Central Massachusetts and will diligently track its positive impact and community outreach efforts. With its community organization partner(s), CPC will record and maintain (in accordance with the Commission's record keeping procedures) employment applications, for both full-time employment opportunities and internship positions, with the expectation that applications from residents of the Impacted Communities will steadily increase during CPC's first 5 years of operation in Barre. In addition, CPC will record and document its participation at Central Massachusetts job fairs and pledges to steadily increase its participation at local job fairs (with specific attention to participating at job fairs within the Impacted Communities) in years 1 through 5 of operation. This process will include recording (through use of sign-in sheets or the like) and following-up (via email communications or mailings) with attendees who express interest in employment opportunities at CPC's cultivation facility in Barre. CPC will then compare and analyze how many of these local residents ultimately apply for either full-time opportunities or internship positions. This analysis will enable CPC to measure its reach into the local community. CPC will regularly audit these results and recalibrate its outreach programs if necessary.

CPC's long-term target for its Barre cultivation facility is to hire a staff that is at least 50% composed of residents (or former residents) of Impacted Communities and/or Central Massachusetts residents with past marijuana-related CORIs and/or parents or spouses with drug convictions by year 5 of operations at CPC's Barre cultivation facility.



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

William Francis Galvin  
Secretary of the  
Commonwealth

Date: April 02, 2018

To Whom It May Concern :

I hereby certify that according to the records of this office,

**THE CAREGIVER-PATIENT CONNECTION, INC.**

is a domestic corporation organized on **October 19, 2016**

I further certify that there are no proceedings presently pending under the Massachusetts General Laws Chapter 180 section 26 A, for revocation of the charter of said corporation; that the State Secretary has not received notice of dissolution of the corporation pursuant to Massachusetts General Laws, Chapter 180, Section 11, 11A, or 11B; that said corporation has filed all annual reports, and paid all fees with respect to such reports, and so far as appears of record said corporation has legal existence and is in good standing with this office.



In testimony of which,

I have hereunto affixed the

Great Seal of the Commonwealth

on the date first above written.

*William Francis Galvin*

Secretary of the Commonwealth

Certificate Number: 18040045460

Verify this Certificate at: <http://corp.sec.state.ma.us/CorpWeb/Certificates/Verify.aspx>

Processed by:



## CERTIFICATE OF GOOD STANDING AND/OR TAX COMPLIANCE



THE CAREGIVER-PATIENT CONNECTION,  
287 CHAPMAN RD  
BARRE MA 01005-9604

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

The Commissioner of Revenue certifies that, as of the date of this certificate, THE CAREGIVER-PATIENT CONNECTION, 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) 887-6367 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

D

# The Commonwealth of Massachusetts

William Francis Galvin

Secretary of the Commonwealth

One Ashburton Place, Boston, Massachusetts 02108-1512

FORM MUST BE TYPED

## Articles of Entity Conversion of a Domestic Non-Profit with a Pending Provisional or Final Certification to Dispense Medical Use Marijuana to a Domestic Business Corporation

FORM MI

(General Laws Chapter 156D, Section 9.53; 950 CMR 113.30)

001244437

The Caregiver-Patient Connection, Inc. is a registrant  
with the Department of Public Health  
in accordance with 105 CMR 725.100(C)  
as of April 25, 2018.

Bryan Harter  
Director

Medical Use of Marijuana Program  
Bureau of Healthcare Safety and Quality  
Massachusetts Department of Public Health

(1) Exact name of the non-profit: Caregiver-Patient Connection, Inc.

(2) A corporate name that satisfies the requirements of G.L. Chapter 156D, Section 4.01:

Caregiver-Patient Connection, Inc.

(3) The plan of entity conversion was duly approved in accordance with the law.

(4) The following information is required to be included in the articles of organization pursuant to G.L. Chapter 156D, Section 2.02(a) or permitted to be included in the articles pursuant to G.L. Chapter 156D, Section 2.02(b):

### ARTICLE I

The exact name of the corporation upon conversion is:

Caregiver-Patient Connection, Inc.

### ARTICLE II

Unless the articles of organization otherwise provide, all corporations formed pursuant to G.L. Chapter 156D have the purpose of engaging in any lawful business. Please specify if you want a more limited purpose:\*

The corporation is organized: (a) to cultivate, manufacture, market, promote, sell, distribute and otherwise provide products containing cannabis, products that enable persons to consume cannabis in different forms and other related products, for both medicinal DE al uses, but only in accordance with the laws of the Commonwealth of Massachusetts; (b) to engage in all activities incidental thereto; and (c) to engage in any other activities in which a corporation formed under the laws of the Commonwealth of Massachusetts may lawfully engage.

5

### ARTICLE III

State the total number of shares and par value, \* if any, of each class of stock that the corporation is authorized to issue. All corporations must authorize stock. If only one class or series is authorized, it is not necessary to specify any particular designation.

WITHOUT PAR VALUE		WITH PAR VALUE		
TYPE	NUMBER OF SHARES	TYPE	NUMBER OF SHARES	PAR VALUE
common	1000 shares			

### ARTICLE IV

Prior to the issuance of shares of any class or series, the articles of organization must set forth the preferences, limitations and relative rights of that class or series. The articles may also limit the type or specify the minimum amount of consideration for which shares of any class or series may be issued. Please set forth the preferences, limitations and relative rights of each class or series and, if desired, the required type and minimum amount of consideration to be received.

See the attached continuation sheet

### ARTICLE V

The restrictions, if any, imposed by the articles or organization upon the transfer of shares of any class or series of stock are:

not applicable

### ARTICLE VI

Other lawful provisions, and if there are no such provisions, this article may be left blank.

*Note: The preceding six (6) articles are considered to be permanent and may be changed only by filing appropriate articles of amendment.*

#### CONTINUATION SHEET IV

The total number of shares of all classes of capital stock which the Caregiver-Patient Connection, Inc. (the "Corporation," ) shall have authority to issue is 1000 shares of Common Stock, no par value per share ("Common Stock").

#### COMMON STOCK

1. **VOTING RIGHTS.** Each owner of record of Common Stock shall be entitled to one vote for each share of stock standing in such owner's name on the books of the Corporation. Except as otherwise required by law, the owners of said stock shall vote together as a single class on all matters submitted to shareholders for a vote (including any action by written consent).
2. **DIVIDENDS.** Subject to the provisions of applicable law, the owners of Common Stock shall be entitled to receive dividends out of funds legally viable therefore at such times and in such amounts as the Board of Directors of the Corporation (the "Board") may determine, declare, order to be paid.

## ARTICLE VII

The effective date of organization of the corporation is the date and time the articles were received for filing if the articles are not rejected within the time prescribed by law. If a later effective date is desired, specify such date, which may not be later than the 90th day after the articles are received for filing:

## ARTICLE VIII

The information contained in this article is not a permanent part of the articles of organization.

- a. The street address of the initial registered office of the corporation in the commonwealth:  
287 Chapman Road, Barre, MA 01005
- b. The name of its initial registered agent at its registered office:  
Joyce landoli
- c. The names and addresses of the individuals who will serve as the initial directors, president, treasurer and secretary of the corporation (an address need not be specified if the business address of the officer or director is the same as the principal office location):

President: Catherine T. Trifilo 120 Rancho Road, Carmel Valley, CA 93924

Treasurer: Dean J. landoli; 120 Rancho Road, Carmel Valley, CA 93924

Secretary: Catherine T. Trifilo 120 Rancho Road, Carmel Valley, CA 93924

Director(s): Dean J. landoli 120 Rancho Road, Carmel Valley, CA 93294  
Catherine T. Trifilo 120 Rancho Road, Carmel Valley, CA 93924  
Thomas Powers 124 Bartemus Trl. Nashua, NH 03063

- d. The fiscal year end of the corporation:  
December 31
- e. A brief description of the type of business in which the corporation intends to engage:  
Cultivate, manufacture, market, wholesale cannabis and related products
- f. The street address of the principal office of the corporation:  
287 Chapman Road, Barre, MA 01005
- g. The street address where the records of the corporation required to be kept in the commonwealth are located is:

287 Chapman Road, Barre, MA 01005 \_\_\_\_\_, which is  
(number, street, city or town, state, zip code)

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

Signed by: \_\_\_\_\_  
(signature of authorized individual)

- ☐ Chairman of the board of directors,
- ☒ President,
- ☐ Other officer,
- ☐ Court-appointed fiduciary,

on this 18<sup>th</sup> day of May, 2018

COMMONWEALTH OF MASSACHUSETTS

William Francis Galvin  
Secretary of the Commonwealth  
One Ashburton Place, Boston, Massachusetts 02108-1512

1311923


**Articles of Entity Conversion of a  
Domestic Non-Profit with a Pending Provisional or  
Final Certification to Dispense Medical Use Marijuana  
to a Domestic Business Corporation**  
(General Laws Chapter 156D, Section 9.53; 950 CMR 113.30)

I hereby certify that upon examination of these articles of conversion, duly submitted to me, it appears that the provisions of the General Laws relative thereto have been complied with, and I hereby approve said articles; and the filing fee in the amount of \$475 having been paid, said articles are deemed to have been filed with me this 15<sup>th</sup> day of June, 20 18, at 12:44 a.m./p.m. (p.m.)

Effective date: \_\_\_\_\_  
(must be within 90 days of date submitted)



WILLIAM FRANCIS GALVIN  
Secretary of the Commonwealth

  
Examiner  
D.B.  
Name approval

Filing fee: Minimum \$250

TO BE FILLED IN BY CORPORATION  
Contact Information:

Caregiver-Patient Connection, Inc. c/o Catherine Trifilo

120 Rancho Road

Carmel Valley, CA 93924

Telephone: 978-798-0878

Email: trifilo@usc.edu

Upon filing, a copy of this filing will be available at [www.sec.state.ma.us/cor](http://www.sec.state.ma.us/cor). If the document is rejected, a copy of the rejection sheet and rejected document will be available in the rejected queue.

SECRETARY OF THE  
COMMONWEALTH  
2018 JUN 15 PM 12:49  
CORPORATIONS DIVISION

CAREGIVER-PATIENT CONNECTION, INC.

BY-LAWS

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# **BY-LAWS**

## **ARTICLE I**

### ***Name, Location and Corporate Seal***

**Section 1. Name:** This Corporation shall be known by the name of: **Caregiver-Patient Connection, Inc.**

**Section 2. Office:** The principal office of the corporation shall be located at: **287 Chapman Road, Barre, MA, 01005** unless otherwise designated by the corporation. The corporation may also have offices at such other places as the Board of Directors may designate.

**Section 3. Seal:** It shall have a corporate seal bearing the name of the corporation and such other device or inscription as the Board of Directors may determine. The Board of Directors may change the form of the seal and the inscription thereon at any time.

## **ARTICLE II**

### ***Fiscal Year***

Except as from time to time otherwise determined by the accountant, the fiscal year of the corporation shall end **December 31<sup>st</sup>, beginning with 2018.**

**ARTICLE III**  
***Meetings of Stockholders***

**Section 1. Annual Meetings:** The annual meetings of the Stockholders of said corporation shall be held on the **2<sup>nd</sup> Tuesday, in October of each year, at 10:00 A.M.** at the office of the corporation unless the Board of Directors shall ten (10) days before such annual meeting vote to hold the same at some other place within the Commonwealth of Massachusetts, and cause a notice of said vote to be sent to the Stockholders at least seven (7) days before such meeting.

**Section 2. Special Meetings:** Special meetings of the Stockholders may be called by the President or Treasurer or by a majority of the Directors, shall be held at the office of the corporation, and shall be called by the Clerk, or in case of the death, absence, incapacity, or refusal of the Clerk, by any other officer upon written application of one or more Stockholders who are entitled to vote and who hold at least one-tenth (1/10) part interest of the capital stock. If no annual meeting is held in accordance with Section 1 above, a special meeting of the stockholders may be held in place thereof, and any action taken at such special meeting shall have the same force and effect as if taken at the annual meeting.

**Section 3. Notice of Meetings:** A written notice of every meeting of Stockholders, stating the place, date and hour thereof, and the purposes for which the meeting is to be held, shall be given by the Clerk or by the person calling the meeting at least seven days before the meeting to each Stockholder entitled to vote thereat and to each Stockholder who by law, or by the Articles of Organization, or by these By-Laws is entitled to such notice, by leaving such notice with him or

at his residence or usual place of business, or by mailing first class, postage pre-paid, addressed to such Stockholder at his address as it appears upon the stock record books of the corporation. A written waiver of notice of a meeting, executed before or after the meeting by any Stockholder entitled to notice or his attorney thereunto authorized and filed with the records of the meeting, shall be deemed equivalent to such notice.

**Section 4. Quorum:** A majority of the stock of the corporation, at the time outstanding and entitled to vote, represented in person or by proxy, shall constitute a quorum for the transaction of business at any meeting of the Stockholders. If a quorum is not represented, less than a quorum may make reasonable adjournments. An affirmative vote of a majority of the stock of the corporation then outstanding and entitled to vote shall be required to transact any business or do any act, except the vote to adjourn, at any meeting of the Stockholders.

**Section 5. Voting:** Stockholders shall have one vote for each share owned by them. Stockholders may vote either in person or by proxy. No proxy which is dated more than six (6) months before the meeting named therein shall be accepted, and no such proxy shall be valid after the final adjournment of such meeting.

**Section 6. Action by Consent:** Any action to be taken by the Stockholders may be taken without a meeting if all Stockholders entitled to vote on the matter consent to the action by a writing filed with the records of the meeting of the Stockholders. Such consent shall be treated for all purposes as a vote at a meeting.

**ARTICLE IV**  
***Board of Directors***

**Section 1. Enumeration, Election, Term of Office:** The Board of Directors shall consist of not less than three Directors, except that whenever there shall be only two Stockholders, the number of Directors shall be not less than two, and whenever there shall be only one Stockholder, the number of Directors shall be not less than one. The number of the directors shall be as determined from time to time by the stockholders and may be enlarged by vote of a majority of the directors then in office. The Directors shall be chosen at the annual meeting of the Stockholders by such Stockholders as have the right to vote thereon, and each shall hold office until the next annual election of Directors or until his successor is chosen and qualified or until he sooner dies, resigns, is removed or becomes disqualified. No Director need be a Stockholder.

**Section 2. Powers:** The Board of Directors shall have the control and management of the business and property of the corporation, and shall also have and may exercise all the powers conferred by or set forth in the Articles of Organization, Massachusetts General Laws, and these by-laws, except as otherwise set forth herein or as otherwise reserved to the Stockholders by law.

**Section 3. Regular Meetings:** An annual meeting of the Directors shall be held immediately after, and at the same place as, the annual meeting of Stockholders. Additional meetings of the Board of Directors may be held at such times and places as the Directors may fix from time to time, and when so fixed, no notice thereof need be given, provided that any Director not present when such times and places are fixed shall be given notice of the fixing of such times and places, or shall waive notice.

**Section 4. Special Meetings:** Special meetings of the Board of Directors may be called by the President, the Treasurer, or by any Director, reasonable notice thereof being given to each Director by the Clerk or an Assistant Clerk, or by the officer or Director calling the meeting.

**Section 5. Notice of Meetings:** Notices of all meetings of the Board of Directors shall be given by the Clerk or by the person calling the meeting, to each Director by delivering or mailing, postage prepaid, to such address as may be registered on the books of the corporation, a written or printed notice at least three (3) days before the meetings, or in person, by fax or by telephone at least one (1) day before the meeting. Notice of a meeting need not be given to any director, if a written waiver of notice, executed by him before or after the meeting, is filed with the records of the meeting, or to any director who attends the meeting without protesting prior thereto or at its commencement the lack of notice to him.

**Section 6. Quorum:** A majority of the Board of Directors then in office shall constitute a quorum for the transaction of business. Though less than a quorum for the transaction of business be present, any meeting may without further notice be adjourned to a subsequent date or until a quorum be had. If a quorum is present, a majority of the Directors present may take any action on behalf of the Board except to the extent that a larger number is required by law, the Articles of Organization, or the By-Laws.

**Section 7. Action by Consent:** Any action required or permitted to be taken at any meeting of the Directors may be taken without a meeting if a written consent thereto is filed by all the

Directors and such written consent thereto is filed with the records of the meeting of the Directors.

Such consent shall be treated as a vote for all purposes.

## **ARTICLE V** ***Officers and Their Duties***

**Section 1. Enumeration, Election, Term of Office:** The officers of the corporation shall be a President, a Treasurer, a Clerk, and such other officers, if any, as the Board of Directors may from time to time, in their discretion, elect. Any officer may, but need not be, a Director or a Stockholder. Except as otherwise provided by law or by the Articles of Organization or by these By-laws, the President, the Treasurer and the Clerk, and any other officers shall be elected annually by the Board of Directors and shall hold office until the first meeting of the Directors following the next annual meeting of Stockholders or until their respective successors are chosen and qualified.

**Section 2. Powers:** Subject to law, the Articles of Organization and other provisions of these By-laws, each officer shall have, in addition to the duties and powers herein set forth, such duties and powers as are commonly incident to his office and such duties and powers as the Directors may from time to time designate.

**Section 3. President and Vice President:** The President unless otherwise provided by the Board of Directors, shall be the chief executive officer of the corporation and shall, subject to the direction of the Board of Directors, have general supervision and control of its business. Unless otherwise

provided by the Board of Directors, he shall preside, when present, as chairman at all meetings of Stockholders and of the Board of Directors. The President or Treasurer shall execute all contracts, documents, leases, releases, deeds, mortgages, both real and personal, and all other instruments to be executed in the name of and on behalf of the corporation. The Vice President shall have all the powers and duties of the President in the absence of the President, and such other powers and duties as the Board of Directors may from time to time designate.

**Section 4. Treasurer and Assistant Treasurer:** The Treasurer shall, subject to the direction of the Board of Directors, have general charge of the financial affairs of the corporation and shall cause to be kept accurate books of account. He shall have custody of all funds, securities and valuable documents of the corporation, except as the Board of Directors may otherwise provide. The Treasurer shall, if required by the Directors, give a bond for the faithful performance of his duties, with sureties, in such amount and in such a manner as may be required by the Directors, the cost of said bond may be paid by the corporation. The Assistant Treasurer shall have all the powers and duties of the Treasurer in the absence of the Treasurer and shall give bond as required of the Treasurer, and such other powers and duties as the Board of Directors may from time to time designate.

**Section 5. Clerk and Assistant Clerk:** The Clerk shall notify the Stockholders and Directors of their respective meetings in accordance with the By-laws of this corporation, and shall perform such other duties as the Directors may from time to time prescribe. The Clerk shall have the custody of the certificate and transfer books and stock ledger of the corporation, and shall record

all transfers of shares in the corporation. The Clerk shall keep a record of all meetings of Stockholders and the Board of Directors and shall have custody of the records of all Stockholders' and Directors' meetings. In the absence of the Clerk from any meeting of Stockholders or Directors, an Assistant Clerk if one be elected, otherwise a Temporary Clerk designated by the person presiding at the meeting, shall perform the duties of the Clerk. The Clerk shall be a resident of Massachusetts unless the corporation has a resident agent appointed for the purpose of service of process.

## **ARTICLE VI**

### ***Resignations, Removals, Vacancies***

**Section 1. Resignations:** Any Director or officer may resign at any time by delivering his resignation in writing to the President or the Clerk, or to a meeting of the Directors. Such resignation shall take effect at such time as is specified therein, or if no such time is so specified, then upon delivery thereof.

**Section 2. Removals:** Directors, including Directors elected by the Directors to fill vacancies in the Board, may be removed with or without assignment of cause by vote of the holders of the majority of the shares entitled to vote in the election of Directors; provided that the Directors of a class elected by a particular class of Stockholders may be removed only by the vote of the holders of a majority of the shares of the particular class of Stockholders entitled to vote for the election of such Directors. The Directors may by vote of a majority of the Directors then in office remove any Director for cause. The Directors may remove any Officer from office with or without

assignment of cause by a vote of a majority of the Directors then in office. A Director or Officer may be removed for cause only after a reasonable notice and opportunity to be heard before the body proposing to remove him. The Directors may terminate or modify the authority of any agent or employee.

**Section 3. Vacancies:** Any vacancy in the Board of Directors, including a vacancy resulting from an enlargement of the Board, may be filled by vote of a majority of the Directors then in office, or in the absence of such election by the Directors, by the Stockholders at a meeting called for that purpose; provided, however, that any vacancy resulting from action by the Stockholders may be filled by the Stockholders at the same meeting at which such action was taken by them. If the office of any officer becomes vacant, the Directors may elect a successor by vote of a majority of the Directors present at the meeting at which such election is made. Each such successor shall hold office for the unexpired term of his predecessor or until his successor shall be elected and qualified, or until he sooner dies, resigns, is removed or becomes disqualified.

## **ARTICLE VII**

### ***Indemnification of Directors and Others***

The corporation may, by vote of the Stockholders, to the extent legally permissible or financially feasible, indemnify any person serving or who has served as a Director or officer of the corporation, or at its request as a Director, Trustee, Officer, Employee or other Agent of any organization in which the corporation owns shares or of which it is a creditor, against all liabilities

and expenses, including amounts paid in satisfaction of judgments, in compromise or as fines and penalties, and counsel fees, reasonably incurred by him in connection with the defense or disposition of any action, suit or other proceeding, whether civil or criminal, in which he may be involved or with which he may be threatened, while serving or thereafter by reason of his being or having been such a Director, Officer, Trustee, Employee, or Agent, except with respect to any matter as to which he shall have been adjudicated in any proceeding not to have acted in good faith in the reasonable belief that his action was in the best interests of the corporation; provided, however, that as to any matter disposed of by a compromise payment by such Director, Officer, Trustee, Employee or Agent, pursuant to a consent decree or otherwise, no indemnification either for said payment or for any other expenses shall be provided, unless:

(a) such compromise shall be approved as in the best interest of the corporation, after notice that it involves such indemnification:

(i) by a disinterested majority of the Directors then in office; or

(ii) by the holders of a majority of the outstanding stock at the time entitled to vote for Directors, voting as a single class, exclusive of any stock owned by any interested Director or officer; or

(b) in the absence of action by disinterested Directors or Stockholders, there has been obtained at the request of a majority of the Directors then in office an opinion in writing of independent legal counsel to the effect that such Director, Officer, Trustee, Employee or Agent, appears to have acted in good faith in the reasonable belief that his action was in the best interests of the corporation.

Expenses, including counsel fees reasonably incurred by any such Director, Officer, Trustee, Employee or Agent in connection with the defense or disposition of any such action, suit or other proceeding may be paid from time to time by the corporation in advance of the final disposition thereof upon receipt of an undertaking by such individual to repay the amounts so paid to the corporation if it is ultimately determined that indemnification for such expenses is not authorized under this section. The right of indemnification hereby provided shall not be exclusive of or affect any other rights to which any such Director, Officer, Trustee, Employee or Agent may be entitled. Nothing contained in this Article shall affect any rights to indemnification to which corporate personnel other than such Directors, Officers, Trustees, Employees or Agents may be entitled by contract or otherwise under law. As used in this Article, the terms "Director," "Officer," "Trustee," "Employee," and "Agent" include their respective heirs, executors and administrators, and an "interested" Director, Officer, Trustee, Employee or Agent is one against whom in such capacity the proceedings in question or other proceedings on the same or similar grounds are then pending.

## **ARTICLE VIII**

### ***Stock and Stock Certificates***

**Section 1. Stock Authorized:** The total number of shares and the par value, if any, of each class of stock which the corporation is authorized to issue, and if more than one class is authorized, a description of each class with the preferences, voting powers, qualifications and special and

relative rights and privileges as to each class and any series thereof, shall be as stated in the Articles of Organization or authorized amendments thereto.

**Section 2. Issue of Authorized Unissued Capital Stock:** The initial issuance of stock shall be in accordance with the subscriptions for stock accepted and authorized by the incorporators and made by the appropriate officers of the corporation as directed by the Board of Directors at the first meeting of the Board of Directors. Thereafter, any unissued capital stock from time to time authorized under the Articles of Organization may be issued by vote of the Stockholders. No stock shall be issued unless the cash, so far as due, or the property, services or expenses for which it was authorized to be issued, has been actually received or incurred by, or conveyed or rendered to, the corporation, or is in its possession as surplus.

**Section 3. Certificates of Stock:** Each Stockholder shall be entitled to a certificate or certificates in form selected by the Board of Directors stating the number and the class and the designation of the series, if any, of the shares held by him. Each such certificate shall be signed by the Chairman of the Board of Directors or the President or a Vice President, and by the Treasurer or an Assistant Treasurer. Each certificate for shares of stock subject to any restriction on transfer pursuant to the Articles of Organization, these by-laws, or any agreement to which the corporation is a party shall have the restriction noted conspicuously on the certificate and shall also set forth on the face or back either the full text of the restriction or a statement of the existence of such restriction and a statement that the corporation will furnish a copy to the holder of such certificate upon written request and without charge. Every certificate issued when the corporation is authorized to issue

more than one class or series of stock shall set forth on its face or back either the full text or the preferences, voting powers, qualifications and special and relative rights of the shares of each class and series authorized to be issued or a statement of the existence of such preferences, powers, qualifications and rights, and a statement that the corporation will furnish a copy thereof to the holder of such certificate upon written request and without charge.

**Section 4. Transfer:** Subject to the restrictions, if any, imposed by the Articles of Organization, these by-laws or any agreement to which the corporation is a party, shares of stock shall be transferred on the books of the corporation only by the surrender to the corporation or its transfer agent of the certificate representing such shares properly endorsed or accompanied by a written assignment of such shares or by a written power of attorney to sell, assign or transfer such shares, properly executed, with necessary transfer stamps affixed, and with such proof that the endorsement, assignment or power of attorney is genuine and effective as the corporation or its transfer agent may reasonably require. Except as may be otherwise required by law, the corporation shall be entitled to treat the record holder of stock as shown on its books as the owner of such stock for all purposes, including the payment of dividends and the right to vote with respect thereto, regardless of any transfer, pledge or other disposition of such stock, until the shares have been transferred on the books of the corporation in accordance with the requirements of these by-laws. It shall be the duty of each Stockholder to notify the corporation of his post office address.

**Section 5. Lost, Mutilated or Destroyed Certificates:** Except as otherwise provided by law, the Board of Directors may determine the conditions upon which a new certificate of stock may be issued in place of any certificate alleged to have been lost, mutilated or destroyed. It may, in its discretion, require the owner of a lost, mutilated or destroyed certificate, or his legal representative, to give a bond, sufficient in its opinion, with or without surety, to indemnify the corporation against any loss or claim which may arise by reason of the issue of a certificate in place of such lost, mutilated or destroyed stock certificate.

**Section 6. Transfer Agent and Registrar:** The Board of Directors may appoint a transfer agent or a registrar or both for its capital stock or any class or series thereof and require all certificates for such stock to bear the signature or facsimile thereof of any such transfer agent or registrar.

**Section 7. Setting Record Date and Closing Transfer Records:** The stock transfer books shall be closed for meetings of Stockholders and for the payment of dividends during such periods as from time to time may be fixed by the Directors; during such periods no stock shall be transferred. If no record date is fixed and the transfer books are not closed, then the record date for determining Stockholders having the right to notice of or to vote at a meeting of Stockholders shall be at the close of business on the day next preceding the day on which notice is given, and the record date for determining Stockholders for any other purpose shall be at the close of business on the day on which the Board of Directors acts with respect thereto.

**Section 8. Restrictions on Transfer:** No Stockholder, including the heirs, assigns, executors, or administrators of a deceased Stockholder shall sell, transfer, assign, pledge, hypothecate or otherwise dispose of, including by gift or by any other manner, whether or not ordered by a court of competent jurisdiction, any of his shares of capital stock of the corporation without first

offering said stock to the corporation through the Board of Directors in accordance with the restrictions of this section.

Any executor, administrator, trustee in bankruptcy, assignee in insolvency, receiver or other person who shall become the holder of any shares of stock otherwise than by issue or sale by the corporation or by transfer in accordance with these restrictions shall offer said stock to the corporation through the Board of Directors in the following manner.

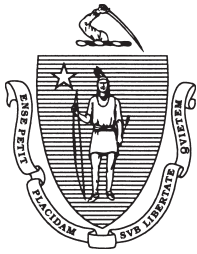
He shall notify the Directors of his desire to sell or transfer by notice in writing, which notice shall contain the price at which he is willing to sell or transfer and the name of one arbitrator. The Directors shall within thirty days thereafter either accept the offer, or by notice to him in writing name a second arbitrator, and these two shall name a third. It shall then be the duty of the arbitrators to ascertain the value of the stock, and if any arbitrator shall neglect or refuse to appear at any meeting appointed by the arbitrators, a majority may act in the absence of such arbitrator.

After the acceptance of the offer, or the report of the arbitrators as to the value of the stock, the Directors shall have thirty days within which to purchase the same at such valuation, but if at the expiration of thirty days, the Corporation shall not have exercised the right to so purchase, the owner of the stock shall be at liberty to dispose of the same in any manner he may see fit.

No shares of stock shall be sold or transferred on the books of the Corporation until these provisions have been complied with, but the Board of Directors may in any particular instance waive the requirement.

**ARTICLE IX**  
***Amendments***

These By-Laws may be altered, amended or repealed only by an affirmative vote of a majority of all the Stockholders of the corporation then outstanding and entitled to vote, represented in person or by proxy, at any meeting of the Stockholders, provided a notice of such proposed alteration, amendment or repeal is given in the call for the meeting.



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

William Francis Galvin  
Secretary of the  
Commonwealth

Date: August 20, 2018

To Whom It May Concern :

I hereby certify that according to the records of this office,

**CAREGIVER-PATIENT CONNECTION, INC.**

is a domestic corporation organized on **June 15, 2018** , under the General Laws of the Commonwealth of Massachusetts. I further certify that there are no proceedings presently pending under the Massachusetts General Laws Chapter 156D section 14.21 for said corporation's dissolution; that articles of dissolution have not been filed by said corporation; that, said corporation has filed all annual reports, and paid all fees with respect to such reports, and so far as appears of record said corporation has legal existence and is in good standing with this office.



In testimony of which,

I have hereunto affixed the

Great Seal of the Commonwealth

on the date first above written.

A handwritten signature in blue ink, reading "William Francis Galvin".

Secretary of the Commonwealth

Certificate Number: 18080365430

Verify this Certificate at: <http://corp.sec.state.ma.us/CorpWeb/Certificates/Verify.aspx>

Processed by:



THE CAREGIVER • PATIENT CONNECTION

Massachusetts Cannabis Control Commission  
101 Federal St.  
13<sup>th</sup> Floor  
Boston, MA 02110

Re: Caregiver-Patient Connection  
MCN281254  
RP201819

Request for Additional Information

To Whom It May Concern:

In your letter dated July 30, 2018, NOTICE: ADDITIONAL INFORMATION REQUIRED, Application of Intent Packet, the Commission noted that the Caregiver-Patient Connection was listed as having an address in Carmel Valley, CA, and requested that the out of state business be added, or to supply an explanation of how it is not applicable.

Please be advised that Catherine Trifilo, President of CPC, and Dean Iandoli, Vice President of CPC (husband and wife) resided in Carmel Valley, CA until August 2018. There was no business entity in CA. The revised binding letter of intent has been changed to reflect this.

Regards,

Dean Iandoli  
Vice President  
Caregiver-Patient Connection



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## **CPC Plan to obtain liability insurance**

CPC will obtain and maintain general liability insurance for no less than \$1,000,000 per occurrence and \$2,000,000 in aggregate annually, and product liability insurance for no less than \$1,000,000 per occurrence and \$2,000,000 in aggregate annually with a deductible no higher than \$5,000 per occurrence. Reports documenting compliance with 935 CMR 500.105(10) will be made in a matter and form determined by the Commission pursuant to 935 CMR 500.000

The insurance issuer will be based upon a competitive bidding process.

# The Caregiver Patient Connection

## Executive Summary

The Caregiver-Patient Connection ('CPC') is a two year-old company based in Barre, MA with a current Provisional Certificate of Registration as a Registered Marijuana Dispensary in good standing with the Massachusetts Department of Public Health. CPC has also qualified for Priority Applicant Status with the Cannabis Control Commission and is applying for licensing as a Marijuana Cultivator and Marijuana Product Manufacturer. Originally formed as a non-profit, CPC has converted to a for-profit Massachusetts LLC.

CPC is dedicated to the cultivation and production of the highest quality medical and adult use cannabis, and cannabis infused products in the state of Massachusetts. By leveraging a well thought out business plan executed by a skilled management team, CPC anticipates creating approximately 8-10 jobs in Barre, MA, a rural community desperately in need of economic growth.

## Keys to Success

CPC has identified three keys that will be instrumental in its success:

- The implementation of strict financial and operational controls resulting in maximum production efficiency and product quality.
- *The acquisition, and cultivation of proprietary strains with targeted phenotypes* designed to maximize product quality
- The recognition and implementation of the philosophy that 100% customer satisfaction is required to ensure a profitable business.

## Products

CPC's founding member owns a six acre, industrially zoned site in Barre, MA where the product will be cultivated, manufactured and packaged. CPC has begun detailed interviews with experienced growers in the Nevada and California markets to partner with, or hire on to oversee the growing, cultivation and production process. These potential partners currently own the rights to numerous unique strands, and are all leaders in their respective markets. These companies have consistently achieved 30-50% wholesale premiums over competitors in their respective markets because of the high quality of their proprietary strains.

## Market

CPC has two anticipated revenue channels:

- Wholesale to select dispensaries that emphasize quality and are willing to pay a premium for that quality.
- CPC is actively seeking two dispensary sites in order to grow the brand name and capture retail revenue streams as well. The market for cannabis in Massachusetts is extremely promising with expected growth to over \$1 billion in the next few years. Some consultants estimate 1.1 million current cannabis users in Massachusetts and that number is expected to grow with the legalization of marijuana and the increased availability of quality, tested products.

## Management Team

CPC was started by Dean Iandoli and Catherine Trifilo in 2016. Michael Staiti will join CPC as part of the management team.

Dean brings a wealth of entrepreneurial and management skills to the company. After graduating from Boston College, Dean had early success in his career acquiring, repositioning, developing and selling a 400-site campground in Barre, MA. He followed this success with developing three commercial scale solar farms in Barre along with Staiti which they currently own and manage. With this background, Dean will be responsible for the day to day operations of the company. Dean will also help oversee development of the cultivation facility as well as renewable energy opportunities.

Catherine is a licensed Massachusetts attorney with extensive experience in real estate and contract law. Upon her retirement from the Massachusetts Bar Association, she earned her Master's Degree from the Davis School of Gerontology at the University of Southern California. She will oversee regulatory compliance, lease negotiation and wholesale contracts and RMD patient outreach programs.

Michael also brings an extensive business background to the team. Staiti has 25 years' experience in starting and operating businesses. He currently is manager/member in 21 operating companies/LLCs in real estate development, construction, commercial solar, property management and banking. Utilizing his CPA and MBA along with his construction background, Staiti will oversee development of the cultivation facility along with Iandoli as well as financial operations of the company.

## Financial Plan

CPC has design plans for a 15,000 SF greenhouse system from Ceres Greenhouse Solutions along with a 3,000 square foot production building which will be built on site. CPC expects this to yield 2,125

pounds of cannabis per year Cannabis prices are expected to decrease in years 2, 3 and 4 before stabilizing in year 4 which is reflected in our condensed financial pro-forma found in Appendix A.

Financial Assumptions:

- 15,000 building
- 65% of canopy space=9,750 square feet of flowering canopy
- Yield per harvest of 39.5 grams per square foot of flowering canopy
- Total Yield per harvest=385,125g, or 13,585 ounces
- Number of Harvests Annually per Square Foot= 2.5
- Total Yield Annually=33,962 ounces-2,122 lbs.
- Wholesale Price per lb. Year #1=\$2,800, Year \$2,500, Year 3-\$2,000

## Appendix A

<b>Caregiver Patient Connection</b>					
Condensed Financials					
		Year 1	Year 2	Year 3	Year 4
Gross Revenues		\$2,679,628	\$6,197,133	\$5,134,426	\$4,363,963
Cost of goods sold		<u>\$1,191,851</u>	<u>\$2,478,853</u>	<u>\$2,053,770</u>	<u>\$1,745,585</u>
Gross Profit		\$1,487,777	\$3,718,280	\$3,080,655	\$2,618,378
Selling, general and admin		<u>\$271,166</u>	<u>\$557,742</u>	<u>\$462,098</u>	<u>\$392,757</u>
EBITDA		\$1,216,610	\$3,160,538	\$2,618,557	\$2,225,621
Depreciation		<u>\$101,174</u>	<u>\$101,174</u>	<u>\$101,174</u>	<u>\$101,174</u>
Net Income		\$1,115,436	\$3,059,363	\$2,517,383	\$2,124,447
280 E tax and CHA	24%	<u>\$267,705</u>	<u>\$734,247</u>	<u>\$604,172</u>	<u>\$509,867</u>
Net Income before taxes		\$847,731	\$2,325,116	\$1,913,211	\$1,614,580



## CPC-Qualifications and Training

The Caregiver Patient Connection (CPC) will require all Marijuana Establishment (ME) Agents be qualified and registered in accordance with 935CMR500.030(1-3), and trained in accordance with the requirements of 935CMR500.105(2) and will include, at minimum the following:

Training tailored to the roles and responsibilities of the job function of each CPC-ME agent which will include a Responsible Vendor Program compliant with 935CMR500.105(2)(b), as well as training in maintaining confidentiality.

CPC-ME agents will receive, at a minimum, eight hours of ongoing training annually.

On or after July 1, 2019, all current owners, managers and employees of the CPC that are involved in the handling and sale of marijuana for adult use at the time of licensure, or renewal of licensures, as applicable, will have attended and successfully completed a responsible vendor program to be designated as a “responsible vendor.”

All new employees involved in the handling and sale of marijuana shall successfully complete a responsible vendor program within 90 days of hire.

After initial successful completion of the responsible vendor program, each owner, manager and employee involved in the handling and sale of marijuana will successfully complete the program once every year to maintain “responsible vendor” designation.

Administrative employees who do not handle or sell marijuana may take the responsible vendor program on a voluntary basis.

Records of responsible vendor training compliance will be maintained for four years and will be available for inspection by the Commission and any other applicable licensing authority upon request during normal business hours



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## **CPC-Policies Restricting Access to age 21 and older**

The Caregiver-Patient Connection (CPC) will restrict access to its' facilities to persons of the age of 21 or older and in accordance with the following:

All Marijuana Establishment (ME) Agents will be 21 years of age and older and in compliance with all registration requirements of 935CMR500.030.

CPC marijuana establishment agents will complete all ME Agent training in accordance with 935CMR500.105(2) and 935CMR500.105(7)(d).

CPC will comply with all advertising, marketing and branding activities prohibited practices defined by 935CMR500.105(4)(b)(1-21).

CPC retail sales will comply with 935CMR500.140(1,2,3,5). Upon entry into the premises of a marijuana retailer by an individual, a ME agent shall immediately inspect the individual's proof of identification and determine the individual's age. An individual will not be admitted to the premises unless the retailer has verified that the individual is 21 years of age or older by an individual's proof of identification.

If the CPC RMD is co-located with the CPC marijuana retailer, individuals younger than 21 years of age, but 18 years or older, shall not be admitted unless they show an active medical registration card issued by the DPH. If the individual is younger than 18, he or she shall not be admitted unless they produce an active medical registration card and they are accompanied by a personal caregiver with an active medical registration card. In addition to the medical registration card, registered qualifying patients 18 years and older and personal caregivers must also produce proof of identification.



## **CPC-Separating recreational from medical operations**

The Caregiver-Patient Connection (CPC) will maintain policies for the physical separation of marijuana and marijuana products for medical and adult use in compliance with 935CMR500.140(3)(7) will include:

Upon entry to the premises of a CPC marijuana retail operation that is collocated with an RMD, a marijuana establishment (ME) agent will immediately inspect the individual's proof of identification and determine that the individual is 21 years of age or older. If the individual is younger than 21 years of age, but 18 years or older, shall not be admitted unless they show an active medical registration card issued by the DPH. If the individual is younger than 18, he or she shall not be admitted unless they produce an active medical registration card and they are accompanied by a personal caregiver with an active medical registration card. In addition to the medical registration card, registered qualifying patients 18 years and older and personal caregivers must also produce proof of identification.

If the CPC Marijuana Retailer operation is collocated with a RMD it will provide for physical separation between medical and adult-use sales areas. Separation may be provided by a temporary, or semi-permanent physical barrier, such as a stanchion that, in the opinion of the Commission, adequately separates sales areas of marijuana products for medical use from sales areas of marijuana products for adult use. CPC will provide for separate lines for sales of marijuana products for medical use from sales of marijuana products for adult use within the sales area, provided, however, that the holder of the medical card may use either line and will not be limited only to the medical use line.

CPC will additionally provide an area that is separate from the sales floor to allow for confidential consultation.

A CPC ME that is selling marijuana products for medical use as well as adult use will create a virtual separation of the products. At the point of retail sale a CPC retail outlet that is also a RMD will designate whether marijuana products are intended for sale for adult use or medical use through tracking methodology approved by the Commission.

A CPC retail ME co-located with a RMD will, on a quarterly basis, submit to the Commission an inventory plan to reserve a sufficient quantity and variety of marijuana products for registered patients based upon reasonably anticipated patient needs as documented by sales records over



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the previous six months. If the reserved patient supply is exhausted and a reasonable substitution cannot be made, CPC will submit a report to the Commission.

CPC may transfer marijuana products reserved for medical use to adult use within a reasonable period of time prior to the date of expiration provided that the product does not pose a risk to health or safety.

## CPC-Maintaining of Financial Records

The Caregiver-Patient Connection (CPC) shall maintain all financial records in compliance with 935CMR500.105(9)(e) and will include:

All records will be maintained in either manual or computerized form and will include the following:

- Assets and liabilities.
- Monetary transactions.
- Books of accounts, which will include journals, ledgers and supporting documents, agreements, checks, invoices and vouchers.
- Sales records including the quantity, form and cost of marijuana products.
- Salaries 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 (ME).

In accordance with 935CMR500.140(6) CPC will record all sales in compliance with the following

- CPC-Fitchburg will only utilize a point-of-sale (POS) system approved by the Commission, in consultation with the DOR, or a sales recording module approved by the DOR.
- CPC will not utilize software or other methods to manipulate or alter sales data.
- CPC will conduct a monthly analysis of its equipment and sales data to determine that no software has been installed that could be utilized to manipulate or alter sales data and that no other methodology has been employed to manipulate or alter sales data.
- CPC will maintain records that it has performed the monthly analysis and produce it upon request to the Commission. If CPC determines that software has been installed for the purpose of manipulation or alteration of sales data or other methods have been utilized to manipulate or alter sales data:
  - CPC shall immediately disclose the information to the Commission
  - CPC will cooperate with the Commission in any investigation regarding manipulation or alteration of sales data
  - CPC will take such other action directed by the Commission to comply with 935 CMR

500.105.

- CPC will comply with 830 CMR 62C.25.1: Record Retention and DOR Directive 16-1 regarding recordkeeping requirements.
- CPC will adopt separate accounting practices at the point-of-sale for marijuana and marijuana product sales, and non-marijuana sales.

Following the closure of a ME, all financial records will be kept for at least two years at the expense of the ME and in a form and location acceptable to the Commission.

## CPC-Personnel Policies Including Background Checks

In compliance with 935CMR500.101(2)(e)(8), the Caregiver-Patient Connection (CPC) will maintain written personnel and background check policies and procedures including, but not limited to:

Background check reports in accordance with 935CMR500.030(1-8) for all board members, directors, employees, executives, managers and volunteers associated with the Marijuana Establishment.

CPC will require that all CPC agents:

- a. Be 21 years of age or older;
- b. Have not been convicted of an offense in the Commonwealth involving the distribution of controlled substances to minors, or a like violation of the laws of another state, the United States or foreign jurisdiction, or a military, territorial, or Native American tribal authority; and
- c. Be determined suitable for registration consistent with the provisions of 935 CMR 500.800 and 500.802.

An application for registration of a marijuana establishment agent will include:

- a. The full name, date of birth, and address of the individual;
- b. All aliases used previously or currently in use by the individual, including maiden name, if any;
- c. A copy of the applicant's driver's license, government-issued identification card, liquor purchase identification card issued pursuant to M.G.L. c. 138, § 34B, or other verifiable identity document acceptable to the Commission;
- d. Attestation that the individual will not engage in the diversion of marijuana products
- e. Written acknowledgment by the applicant of any limitations on his or her authorization to cultivate, harvest, prepare, package, possess, transport, and

dispense marijuana in the Commonwealth;

Background information will include, as applicable

- a. A description and the relevant dates of any criminal action under the laws of the Commonwealth, or another state, the United States or foreign jurisdiction, or a military, territorial, or Native American tribal authority, whether for any felony or misdemeanor and which resulted in conviction, or guilty plea, or plea of no lo contendere, or admission of sufficient facts.
- b. A description and the relevant dates of any civil, or administrative action under the laws of the Commonwealth, or another state, the United States or foreign jurisdiction, or a military, territorial, or Native American tribal authority relating to any professional, occupational or fraudulent practices.
- c. A description of any relevant dates of any past, or pending denial, suspension, or revocation of a license or registration, or the denial of a renewal of registration or license, for any type of business or profession by any state, federal or local government or any foreign jurisdiction.
- d. A description and relevant dates of any past discipline by, or a pending disciplinary action or unresolved complaint by the Commonwealth, or a like action or complaint by another state, the United States or foreign jurisdiction, or a military, territorial, or Native American tribal authority with regard to any professional license or registration held by the applicant.

All CPC-ME executives registered with the Department of Criminal Justice Information Systems pursuant to 803 CMR 2.04 will submit to the Commission a Criminal Offender Record Information (CORI) report and any other background check information required by the Commission for each individual for whom CPC seeks a ME agent registration which will be obtained within 30 days prior to submission.

A Marijuana Establishment shall notify the Commission no more than one business day after a marijuana establishment agent ceases to be associated with the establishment. The registration shall be immediately void when the agent is no longer associated with the establishment.

A registration card shall be valid for one year from the date of issue, and may be renewed on an annual basis upon a determination by the Commission that the applicant for renewal continues to be suitable for registration.

After obtaining a registration card for a marijuana establishment agent, a Marijuana Establishment is responsible for notifying the Commission, in a form and manner determined by the Commission, as soon as possible, but in any event, within five business days of any changes to the information that the establishment was previously required to submit to the Commission or after discovery that a registration card has been lost or stolen.

A marijuana establishment agent shall carry the registration card associated with the appropriate Marijuana Establishment at all times while in possession of marijuana products, including at all times while at the establishment or while transporting marijuana products.

A marijuana establishment agent affiliated with multiple Marijuana Establishments shall be registered as a marijuana establishment agent by each Marijuana Establishment and shall be issued a registration card for each establishment.

CPC will maintain a staffing plan that demonstrates accessible business hours and safe cultivation conditions.

CPC will maintain a personnel record for each ME agent for at least 12 months and shall include:

- All materials submitted to the CCC pursuant to 935CMR500.030(2)
- Documentation of verification of references.
- Job descriptions that include duties, authority, responsibilities, qualifications and supervision.
- Documentation of all training, including training in privacy and confidentiality, and signed statements of the individual indicating the time, date, place he or she received said training and the topics discussed, including the name and title of the presenters.
- Documentation of periodic performance evaluations
- Record(s) of any disciplinary actions taken.

On or after July 1, 2019, all current owners, managers and employees of CPC that are involved in the handling and sale of marijuana for adult use at the time of licensure or renewal of licensure, as applicable, shall have attended and successfully completed a responsible vendor program to be designated a “responsible vendor” in accordance with 935CMR500.105(2)

All CPC registered agents will handle marijuana in compliance with 935CMR500.105(3)(b)(1-2)

All personnel records will be kept for at least two years at the expense of the CPC and in a form and location acceptable to the Commission.

CPC, as part of its’ workplace policies will maintain an alcohol, smoke, drug-free workplace in accordance with 935 CMR 500.105(1)(j).

In accordance with 935CMR500.105(1)(k) CPC will maintain a plan describing how confidential information will be maintained.

935CMR500.105(l)(1-3) CPC policies will call for the immediate dismissal of any marijuana establishment agent who has diverted marijuana, engaged in unsafe practices, or been convicted or entered a guilty plea for a felony charge of distribution of a drug to a minor.



## CPC-Quality Control and Testing

The Caregiver-Patient Connection's (CPC) operating procedures for quality control, sampling and testing requirements will be in accordance with 935CMR500.160 and shall include the following:

In compliance with 935CMR500.105(9):

- No marijuana product, including marijuana, will be sold, or otherwise marketed for adult use that is not capable of being tested by an Independent Testing Laboratory (ITL), except as allowed under 935CMR500.000. CPC products will be deemed in compliance with 935CMR500.160.

Marijuana will be tested for cannabinoid profile which will include the percentage by dried weight of (THC), (CBD), (THCa) and (CBDa), as well as for contaminants including, but not limited to mold, mildew, heavy metals, plant growth regulators and the presence of pesticides not in compliance with 935CMR500.120(5) as well as any additional testing required by the Commission.

Testing of environmental media will be performed in compliance with 935CMR500.160(1). Test results will be maintained by CPC for one year. Clones are subject to testing provisions, but are exempt from the testing of metals.

CPC will have written policies and procedures for responding to laboratory results that indicate contaminant levels above the acceptable limit established in 935 CMR 500.160(1). CPC's policies will require that it notify the Commission within 72 hours of any lab result indicating that the contamination cannot be remedied and policies for disposing of the production batch. The notification will be from both the ITL and CPC, separately and directly. CPC will describe a proposed plan to the Commission for both the destruction of the contaminated product and assessment of the source of contamination.

CPC will maintain test results for no less than one year.

The sale of seeds is not subject to the testing procedures.

Transportation to and from Independent Testing Laboratories will be in compliance with 935CMR500.105(13).

Storage of marijuana at the laboratory will comply with 935CMR500.105(11).

Excess marijuana will be disposed in compliance with 935CMR500.105(12) either by the Testing Laboratory returning the excess marijuana to CPC for disposal, or by the Laboratory disposing of it directly.

Plans for quality control will include product testing for contaminants in compliance with 935CMR500.160(1)

CPC will utilize cultivation and storage practices and procedures to limit contamination including mold, fungus, bacterial disease, rot, pests, and the use of pesticides not in compliance with 935CMR500.120(5).

CPC Agents will handle marijuana safely and in a sanitary way which will be in compliance with 935CMR500.105(3) and include the following:

- A CPC will process marijuana in a safe and sanitary manner.
- CPC will process the leaves and flowers of the marijuana plant only, which shall be: 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.
- Any CPC marijuana establishment agent whose job includes contact with marijuana or nonedible marijuana products, including cultivation, production, or packaging, will be subject to the requirements for food handlers specified in 105 CMR 300.000: Reportable Diseases, Surveillance, and Isolation and Quarantine Requirements;
- CPC establishment agents working in direct contact with preparation of marijuana or nonedible marijuana products shall conform to sanitary practices while on duty, including:
  - Maintaining adequate personal cleanliness
  - b. Washing hands thoroughly in an adequate hand-washing area before starting work, and at any other time when hands may have become soiled or contaminated.
- Hand-washing facilities shall be adequate and convenient and shall be furnished with

running water at a suitable temperature

- Sufficient space for placement of equipment and storage of materials as is necessary for the maintenance of sanitary operations
- Litter and waste shall be properly removed, disposed of so as to minimize the development of odor and minimize the potential for the waste attracting and harboring pests. The operating systems for waste disposal shall be maintained in an adequate manner pursuant to 935 CMR 500.105(12);
- Floors, walls, and ceilings shall be constructed in such a manner that they may be adequately kept clean and in good repair
- There shall be adequate safety lighting in all processing and storage areas, as well as areas where equipment or utensils are cleaned
- Buildings, fixtures, and other physical facilities shall be maintained in a sanitary condition
- All contact surfaces, including utensils and equipment, shall be maintained in a clean and sanitary condition. Such surfaces shall be cleaned and sanitized as frequently as necessary to protect against contamination, using a sanitizing agent registered by the US Environmental Protection Agency (EPA), in accordance with labeled instructions. Equipment and utensils shall be so designed and of such material and workmanship as to be adequately cleanable;
- All toxic items shall be identified, held, and stored in a manner that protects against contamination of marijuana products
- CPC's water supply shall be sufficient for necessary operations
- Plumbing will be of adequate size and design, and adequately installed and maintained to carry sufficient quantities of water to required locations throughout the CPC Marijuana Establishment. Plumbing shall properly convey sewage and liquid disposable waste from the Marijuana Establishment. There shall be no cross-connections between the potable and waste water lines
- CPC shall provide its employees with adequate, readily accessible toilet facilities that are maintained in a sanitary condition and in good repair
- Products that can support the rapid growth of undesirable microorganisms shall be held



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in a manner that prevents the growth of these microorganisms

- Storage and transportation of finished products shall be under conditions that will protect them against physical, chemical, and microbial contamination as well as against deterioration of finished products or their containers
- All vehicles and transportation equipment used in the transportation of marijuana products or edibles requiring temperature control for safety must be designed, maintained, and equipped as necessary to provide adequate temperature control to prevent the marijuana products or edibles from becoming unsafe during transportation, consistent with applicable requirements pursuant to 21 CFR 1.908(c).



## CPC-Record Keeping Procedures

The Caregiver-Patient Connection (CPC) will maintain records in accordance with 935CMR500.105 and 935CMR500.105(8) and will include the following:

Written operating procedures as required by 935CMR500.105(1)

Inventory records as required by 935CMR500.105(8) which will include:

- Record of all inventories taken which will include, at a minimum, the date of the inventory, a summary of the inventory findings, and the names, signatures and titles of the individuals who conducted the inventory.

Seed to sale tracking records as required by 935CMR500.105(8)(e)

Personnel records as required by 935CMR500.105(9)(d) that will be maintained for at least 12 months, which will include:

- All materials submitted to the Commission pursuant to 935 CMR 500.030(2)
- Documentation of verification of references
- The job description or employment contract that includes duties, authority, responsibilities, qualifications, and supervision 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;
- Responsible Vendor Training records in compliance with 935CMR500.105(2)(b)(5).

Business records in compliance with 935CMR500.105(9)(e) which will include:

- 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
- 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

Waste Disposal records as required by 935CMR500.105(12) which will include:

- A written or electronic record of the date, the type and quantity of marijuana disposed or handled, the manner of disposal or other handling, the location of disposal or other handling, and the names of the two CPC Agents present during the disposal or other handling, with their signatures.
- CPC will keep these records for at least three years. This period shall automatically be extended for the duration of any enforcement action and may be extended by an order of the Commission.

Manifests for transportation in accordance with 935CMR500.105(13)(f) which will include manifests which will include:

- The originating Marijuana Establishment name, address, and registration number
- The names and registration numbers of the CPC agents who transported the marijuana products
- The name and registration number of the marijuana establishment agent who prepared the manifest
- The destination Marijuana Establishment name, address, and registration number
- A description of the marijuana products being transported, including the weight and form or type of product
- The mileage of the transporting vehicle at departure from originating Marijuana Establishment and mileage upon arrival at destination Marijuana Establishment, as well as mileage upon return to originating Marijuana Establishment;
- The date and time of departure from originating Marijuana Establishment and arrival at the destination Marijuana Establishment for each transportation
- A signature line for the marijuana establishment agent who receives the marijuana products
- The weight and inventory before departure and upon receipt
- The date and time that the transported products were re-weighed and re-inventoried
- The name of the marijuana establishment agent at the destination Marijuana Establishment who re-weighed and re-inventoried products
- The vehicle make, model, and license plate number.

- CPC will retain all transportation manifests for no less than one year and make them available to the Commission upon request.

Additionally, CPC shall comply with 935CMR500.140(6) and record all sales in compliance with the following

- CPC-Fitchburg will only utilize a point-of-sale (POS) system approved by the Commission, in consultation with the DOR, or a sales recording module approved by the DOR.
- CPC will not utilize software or other methods to manipulate or alter sales data.
- CPC will conduct a monthly analysis of its equipment and sales data to determine that no software has been installed that could be utilized to manipulate or alter sales data and that no other methodology has been employed to manipulate or alter sales data.
- CPC will maintain records that it has performed the monthly analysis and produce it upon request to the Commission. If CPC determines that software has been installed for the purpose of manipulation or alteration of sales data or other methods have been utilized to manipulate or alter sales data:
- CPC shall immediately disclose the information to the Commission
- CPC will cooperate with the Commission in any investigation regarding manipulation or alteration of sales data
- CPC will take such other action directed by the Commission to comply with 935 CMR 500.105.
- CPC will comply with 830 CMR 62C.25.1: Record Retention and DOR Directive 16-1 regarding recordkeeping requirements.
- CPC will adopt separate accounting practices at the point-of-sale for marijuana and marijuana product sales, and non-marijuana sales.

Following the closure of a Marijuana Establishment, all records will be kept for two years at the expense of the ME and in a form and location acceptable to the Commission

## CPC Diversity Plan

### Introduction

The Cannabis Control Commission (“Commission”), through 935CMR500.000 requires applicants for licensure to establish goals to promote equity for minorities, women, veterans, people with disabilities and people with gender identities and sexual orientations.

The Caregiver-Patient Connection (CPC) is currently renewing license #MC281254

### Goals

It is the goal of CPC to promote equity and to provide opportunities to qualified women and veteran applicants with disregard to race, sex, disabilities or gender identities or sexual orientation. CPC will achieve this goal through a targeted outreach to veteran’s and women in the central Massachusetts area in order to facilitate and promote employment and career opportunities within the CPC structure. Our goal will be to have a workforce comprised of at least 50% women and veterans by the end of the first year of operation.

### Programs

CPC will encourage women and veterans to apply for employment opportunities at the CPC Fitchburg Retail Marijuana Establishment (MRN282131), the CPC Barre cultivation facility, currently operational (MC281254), as well as the Barre cultivation operation that is part of this application(MCN282237), and the CPC Framingham Cultivation facility (MCN282206) and Manufacturing facility (MPN281301), both expected to be operational in 2020.

In order to accomplish this CPC will advertise in during the first week of September 2019, in the Fitchburg Sentinel newspaper, for a job fair to be held at the Fitchburg Public Library on September 7, 2019. ***(Note: CPC is not ‘partnering’ with the Fitchburg Public Library. CPC is utilizing one of the meeting rooms located in the library that are available for events. CPC completed and submitted an application to the F.P.L. and was approved by the F.P.L. for the September 7 event.)*** As part of the September 7<sup>th</sup> event, CPC will also hold an informational session for local veterans interested in learning more about the opportunities in the Massachusetts cannabis industry including cultivation, transportation, security, marketing and retail operations.

Subsequently, a veteran’s informational meeting/job fair will be held annually in September at the Fitchburg Public Library and advertised in the Fitchburg Sentinel as part of the annual veterans job fair advertisement. CPC will also release ‘community notices’ to the Fitchburg Sentinel, the Barre Gazette and the Metrowest Daily News (Framingham) for print announcing the veteran’s info session/job fair.

Additionally, beginning in September 2020, CPC will hold an open job fair in order to meet its’ goal of 50% veterans and women throughout all of its’ operations.

CPC will implement a mentoring program designed to help qualified local veterans with an interest in the Massachusetts cannabis industry. Mentor applicants will be chosen by CPC from the applicants attending the annual veterans September job fair. Two mentees will be chosen after each September's Veteran Info Session/Job Fair. Each mentee will spend full 'intern' days with CPC team members at each component of the CPC operation; cultivation, manufacturing and retail. CPC managers from each part of the operation will provide a written summary review of each mentee's strengths and interests in specific components of the MA cannabis industry to the CPC managers. Upon this review CPC will either provide employment to the mentees, if available at that time, or assist in making employment introductions with other licensed cannabis operators in MA.

The CPC website, currently under design, will have a veteran-specific page created to promote future veteran job fairs and information sessions, as well as a question-answer forum designed to assist local, qualified veterans with job leads in other Massachusetts cannabis operations.

All advertising will be in compliance with the requirements set forth in 935CMR500.105(4)

## Measurements

In accordance with the Commission's "Guidance on Required Positive Impact Plans and Diversity Plans", CPC will:

- Review and record, annually, the result of its' goal to comprise 20% of its' team with veteran's.
- Review and record the number of new veteran hires annually.
- Review and record the number of veteran attendees at its' annual informational session/job fair.
- Review and record the number of veteran attendees to the above informational sessions whom have successfully entered the Massachusetts cannabis industry, either with CPC or with another licensed operation.
- Review and record its' veteran's website traffic in order to gauge the success of its' on-line outreach.
- CPC will annually measure the success of inter-corporate promotions of its' veteran employees.
- Record the employment success rate of mentees.

CPC's Diversity Plan and any actions taken, or programs instituted by CPC will not violate the Commission's regulations with respect to limitation on ownership or control, or other applicable state laws.

# **CAREGIVER-PATIENT CONNECTION LLC**

## **ENERGY COMPLIANCE PLAN**

MC281254 is a Tier II outdoor cultivation facility and is not subject to energy compliance.