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Appendix I



TOWN OF CONCORD
COMMUNITY PRESERVATION COMMITTEE

141 KEYES ROAD, CONCORD, MA 01742
TEL. (978) 318-3290 FAX (978) 318-3291

PLANNING & LAND MGT
TOWN OF CONCORD, MA

Application for CPC Funding

Due no later than 12:00 noon on Friday, September 19, 2025

Applicant*: WRIGHT TAVERN LEGACY TRUST
Federal Tax Id. No.*: 87-3687449
Co-Applicant (if applicable): _____

Project Name*: WRIGHT TAVERN ENERGY PROJECT Project
Location/Address (if applicable): 2 LEXINGTON ROAD, CONCORD, MA
Purpose*: (Select all that apply)

Open Space Community Housing Historic Preservation Recreation

Project Budget*:

Amount of CPC Funds Requested: \$ 250,000
Amount from Other Funding Sources: \$ —
Total Project Budget: \$ 250,000
(If multi-year project, note current phase only)

Please check which of the following is included with this Application:

- | | |
|-----------------------------------------------------------------------------|------------------------------------------------------------------------------------------------------------|
| <input checked="" type="checkbox"/> One Paragraph Project Summary * | <input checked="" type="checkbox"/> Architectural plans, site plans, photographs (if appropriate) |
| <input checked="" type="checkbox"/> Map (if applicable) | <input checked="" type="checkbox"/> Copy of IRS determination letter (Non-profit Organizations only)* |
| <input checked="" type="checkbox"/> Narrative * | <input checked="" type="checkbox"/> Completed W-9 Form (Non-profits only)* |
| <input checked="" type="checkbox"/> Selection Criteria and Needs Assessment | <input checked="" type="checkbox"/> Copy of Audit or most recent Financial Information (Non-profits only)* |
| <input checked="" type="checkbox"/> Detailed Project Budget * | <input type="checkbox"/> Letters of Support (if any) |
| <input checked="" type="checkbox"/> Feasibility Assessment | |
| <input type="checkbox"/> Statement of Sustainability (if applicable) | |
| <input checked="" type="checkbox"/> Timeline * | |

Project Contact Person*: TOM WILSON
Project Contact Address*: 65 WHITTEMORE ST, CONCORD, MA 01742
Project Contact Phone*: 617-281-1198 Email*: TOMO@WRIGHTTAVERN.ORG

Authorized Signature of Applicant*: *Tom Wilson*

Authorized Signature of Property Owner* (if different): *James B. John, Lead Minister* * Required

For Historic Preservation Projects Only – please check the box below left and acknowledge:

I/We have read the U.S. Secretary of the Interior's Standards for the Treatment of Historic Properties and understand that planning for and execution of this project must meet these standards.



Community Preservation Committee Grant Proposal

Wright Tavern

September 19th, 2025

Project Summary:

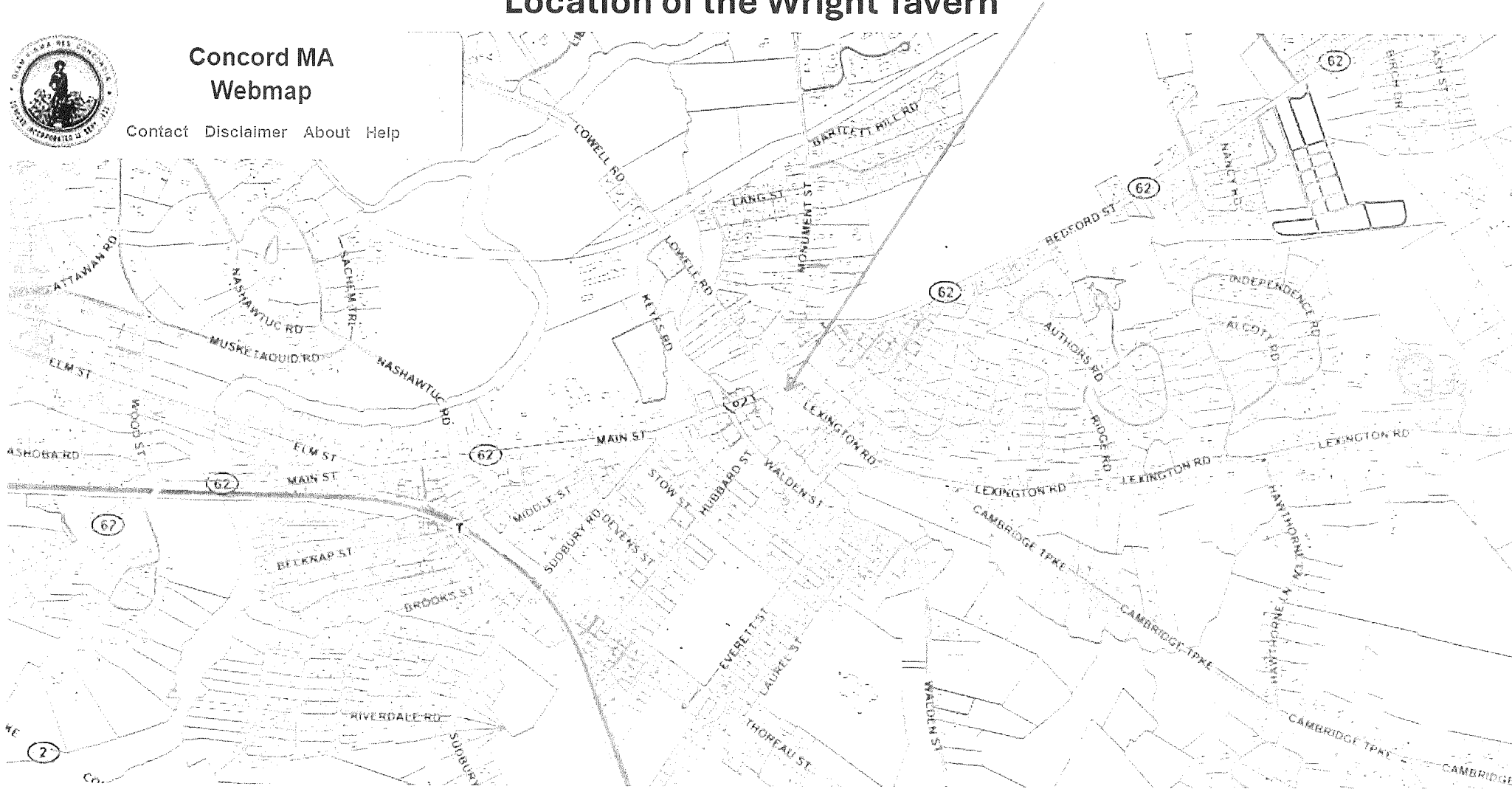
For several years, the Wright Tavern has been undergoing substantial preservation and rehabilitation. Based on a grant provided by the Community Preservation Committee (CPC) in 2021 and 2022, we have completed major structural stabilization to the building and many improvements to the electrical systems. But, the work to preserve the building and repurpose it into an important gathering place and historic site in Concord is not complete. We have projects identified a mostly funded for areas include the exterior and installation of the Refreshment Center. What are needed now are two critical infrastructure improvements to the building that will prepare it to provide improved services to the community and a more efficient operation. We are seeking funding to improve the electrical service from 200 amp to 400 amp and upgrade the wiring in the building, so it is code compliant and safe from electrical based fires. We are also seeking funding to install a new heat pump, electric HVAC system (heating, ventilation and air-conditioning system) throughout the building. This will not only be more energy efficient and sustainable, it will make a major difference to tourists, visitors, event participants and office holders when they come to the Wright Tavern. We intend to be open to the public year-round, and an efficient heating and cooling system are critical. We also seek to acquire antique furniture, objects and paintings, and such a system is critical to their preservation. These are milestones in the transformation of the Wright Tavern into a world-class historic site of which Concord can be proud.

GIS Map of Concord Location of the Wright Tavern



Concord MA
Webmap

Contact Disclaimer About Help





Community Preservation Committee Grant Proposal

Wright Tavern

September 19th, 2025

Narrative Description of the Proposed Project and Its Importance

The Wright Tavern was built in 1747. Over its almost 300-year history it has had 16 owners and over 40 different uses. In 2021 after over a year of study and discussions with members of the Concord community, First Parish decided to repurpose the building into a gathering place, a community focused historic site, and a center for civic engagement. The Wright Tavern Legacy Trust was formed to oversee the restoration, preservation and development of this vision.

In 2021 and 2022 through the support and grants of the Community Preservation Committee, we were able to make major structural stabilization improvements to the building. The walls, roof and flooring are now stabilized in a manner that meets or exceeds building codes. We have also received additional funding from private foundations and individuals to make significant improvements to the interior space and lighting. CPC funds were used to upgrade the lighting where we could within the budget and timing needed to prepare for Concord 250. We have other projects and funding sources to preserve and sustain the building aligned with the vision and responsibilities we have to the Concord community.

However, the building is seriously out of compliance for its electrical services and its heating and air-conditioning are a crazy-mixture of service units that are seriously inefficient. The ceilings in the basement have a complex array of wires with little understanding whether they are functioning or not, dangerous or not, but all but those recently installed are out of code. The heating and cooling systems are complex to be kind, and some were installed when the building became an inn and restaurant in the late 19th and early 20th Century. There are cast iron radiators, vented-heating baseboards, window AC units, split heat and air-conditioning units, and old central air-conditioning units in

some areas. The heating system currently uses an oil-based system where new pipes were installed over an 20- to 30-year-old furnace. There are photographs attached showing many of these conditions. The 2014 History Structures Report noted over 37 issues with the current electrical systems, ranging from fixtures that don't work to wiring that was dangerous to concerns about the continued use of "knob-and-tube distribution wiring." They also indicated eight issues with the air conditioning and 13 issues with the heating systems. Needless to say, all of these infrastructure systems are highly energy wasteful and work haphazardly. These are not the conditions needed for a world-class historic site in Concord and has potentially hazardous conditions for the building.

Our funding request will focus on two critical elements – upgrade the electrical services within the building and install a new heating, ventilation and air-conditioning services within the building. This is part of a multi-year plan to transform the Wright Tavern according to our vision while retaining its unique and historic elements. This will be managed by professional contractors and the Wright Tavern Legacy Trust Board, in collaboration with DSK Architects, our advisors in the preservation and improvements to the building. Our plan is to have both projects completed over the summer and Fall (July - December) of 2026 for the on-going opening for the Concord residents and visitors over the holidays and winter, and tourist season in April.

Our plan is to upgrade the electrical systems in the building so that they meet all codes and we can increase the power wattage of the building from a 200-amp system to a 400-amp system. This will enable us to protect the building from electrically caused fires and install technology-based exhibits that enhance the visitor experience. We do not intend to create Wright Tavern into an object-oriented museum but rather leverage the authentic experience of being in a place where history happened. Our current electrical services will not permit us to use attractive and enriched exhibits or support a new HVAC system.

With the new electrical power, we want to install a new heating and cooling system that is consistent throughout the building, to benefit the visitor areas on the first floor and the offices on the second floor. It should service the basement and the "research-designated" third floor. We want to install a heat-pump electric-based heating and cooling system, using the latest technology to manage the air-flow and efficient energy systems. We also will use advanced duct systems which will have minimal impact on the floors, ceilings and historic elements of the building. Once our initial assessment and layout have been determined, we will decide whether any of the existing systems need to be retained for back-up heat or air-cooling needs. Our first step is to prepare an assessment and develop a plan with various experts, and then present this plan to the CHC and CPC for review and approval. This will of course determine the course and timing of these projects.

We have received quotes from several firms for each project and will base our selection of the contractor based on the funds availability and their ability to meet our timing and customer experience requirements. We also anticipate an some escalation of fees and other unknown challenges for our installation of these new systems, so we are including a contingency fund that will be used if necessary. Our commitment, however, is to achieve these projects within the budget approved by the CPC.

In summary, our project protects and strengthens the infrastructure of the Wright Tavern in a way that will provide a better experience to the visitor, whether they come for a tour, a meeting or event, personal gatherings or enjoyment of the new Wright Tavern Pub. We hope the CPC views this in important alignment with your mission and desires for the Wright Tavern. We appreciate your thoughtful consideration and look forward to our discussions.

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Community Preservation Committee Grant Proposal

Wright Tavern

September 19th, 2025

Responses to CPC Selection Criteria and Needs Assessment

1. **Address objectives or projects identified in the *Historic Resources Master Plan*, the *Survey of Historical and Architectural Resources, 2018 Comprehensive Long Range Plan*, *2015 Open Space and Recreation Plan*, and the *Concord Reconnaissance Report – Massachusetts Heritage Landscape Program, 2006*.**

An overarching theme of these surveys and reports is the need to preserve unique historic places in Concord and enable them to strengthen our community, enhance the education of our citizens and visitors, and invest in the preservation of these properties. This is what the Wright Tavern is all about. From the beginning of our journey to this point in time, we have held the importance of preservation, restoration and community engagement high on our goals. This grant proposal is part of a long-term plan to strengthen the capabilities of the Wright Tavern to fulfill this mission. While the nature of this work is simple and standard, it is unique because of the historic setting in which this work will take place. Hence, we will take great care to make sure these improvements to the building are successful in meeting their requirements and will be virtually invisible to the visitor and historian alike.

2. **Increase the level of citizen knowledge about Concord's historic and cultural resources, and available historic protection mechanisms.**

In April, 2025, we successfully opened the Wright Tavern to the public and began the next chapter in the life of this very historic building in Concord. The future services, programs, sustainability of the Wright Tavern will depend heavily on the infrastructure systems. If we can provide better educational experiences for our

visitors, and if we are able to provide accessibility year-round, then the Wright Tavern can take its rightful place in telling the history of Concord and the founding of our nation. These two projects – the upgrade electrical services and the new HVAC systems – are important parts to making the Wright Tavern a world-class site for gatherings, civic engagement and education. The impact of these infrastructure projects to the capabilities of the Wright Tavern cannot be over emphasized. The details are described more below.

3. Supplement project funding for historic buildings that provide public access, allow public functions, and depend on public funding for their preservation.

The purpose of the projects for this grant is to fund the preservation of this highly historic building – the Wright Tavern. These projects are intended to create a more energy efficient and consistently enjoyable visitor experience. While we have been able to open the Wright Tavern to the public, and provide tours, events (e.g., four Beer Garden Celebrations) and celebrations, the risks associated with straining the current electrical system and expense of highly inefficient energy systems are hidden from the public. We seek to address these core issues.

4. Provide funds for historic resources that are eligible for National Register status or are within the historic districts.

The Wright Tavern is a National Historic Landmark and exists within the historic district of Concord.

5. Help ensure that a threatened historic resource is saved.

The Wright Tavern was electrified in the early 20th Century. The Historic Structures Report prepared in 2014 identified over 45 risks associated with the electrical systems in the building. Some of these have been addressed, but many remain. Our concern is that these present a fire hazard to the building. When we were working on certain improvements, we also discovered that virtually the entire building's electrical systems are not up to code. We are seeking to add new services and capabilities that will require better amperage capacity and improve the wiring and electrical services throughout the building to better protect it from electrical based fires. Further, the installation of advanced HVAC systems will not only improve the energy use of the building, it will also improve the environment within the building for visitors, be they tourists, attendees at meetings, participants in a celebration or office holders on the second floor. These actions will protect the Wright Tavern and it's visitors for decades to come.

6. Preserve the settings of historic buildings or cultural landscapes, such as farmland.

This project will occur only within the building and will not extend beyond the boundary of the building except for any necessary improvements in the electrical services coming from the Town. We have determined with the Town's electricity inspectors that there is sufficient space in the pipeline available to extend the electric service cables from the transformer to the building. So, no excavation will be needed to bring additional power to the building.

7. Enable multipurpose projects that will help preserve historic landscapes and other historic resources while meeting the criteria for other CPA interests.

This project will involve two critical infrastructural elements within the Wright Tavern – the heating/cooling and air flow and the electrical services that include lighting, security, exhibits, office services, communications. Consequently, the successful implementation of these projects will have multiple immediate and long-term impacts on how the building is used in the future, and the kind of experience it provides to its visitors throughout the year. We intend to be open year-round, and be a place for gatherings and events. This will require many of the services described above from the improvements to the core infrastructure of the building.

8. Include an historic preservation restriction.

We have all the terms and conditions approved for the Preservation Restriction Agreement between the Town of Concord and First Parish in Concord for the Wright Tavern. Only the formal signatures are lacking. This has taken an exceeding long time to develop, but at the beginning of this journey to reach this Agreement, we committed the Wright Tavern to live up to the terms of the Agreement even though it was not in-force. We believe we have lived up to this commitment. Once we have the plans for the development of both the HVAC system and the electrical upgrades, we will seek approval from the Concord Historical Commission prior to their implementation. We also anticipate the CPC will want to review these plans to make sure they are consistent with your requirements. We will take great care to minimize the impact on any historic elements of the building or if changes are necessary, they will be reversible consistent with the Interior Department Standards for Historic Preservation.

9. Meet the Secretary of the Interior Standards for the Treatment of Historic Properties (see Appendix VI), which is mandatory for *all* historic preservation projects funded under the CPA.

Our plans and our contractors are quite familiar with these standards and requirements. We will be working with the CHC to assure our full compliance with these Standards and accommodate the new uses for the Wright Tavern. The recent approval of the CHC to our plans for the Refreshment Center on the first floor and the preparation area and Brewery in the basement is a statement to our shared commitment to meeting these historic preservation standards.



Community Preservation Committee Grant Proposal

Wright Tavern

September 19th, 2025

Project Budget

The following table shows the projected cost breakdowns for the two projects described above. This described the scope and nature of the work requested for funding from the Community Preservation Committee. See the detail description of the scope and nature of each phase on the next page.

Mechanical and electrical assessment and plan	\$15,000
Electrical Upgrades	
Phase I – Upgrade service from 200 amp to 400 amp	\$42,000
Phase II – Bring current wiring up to code	\$35,000
Install New Heating, Ventilation and Air-Conditioning System	
Phase I – First floor HVAC	\$48,000
Phase II – Second floor HVAC	\$48,000
Finish work on installation of HVAC and Electrical Fixtures	\$22,000
Contract Management, Permit fees and Approvals	\$10,000
Contingency for unplanned work requirements	\$30,000
Total Requested Funds	\$250,000

Wright Tavern Sustainability Project -- Budget based on contractors' estimates

Budget

Mechanical and electrical assessment and plan	\$ 15,000
<p>Work with Mechanical, electrical, plumbing expert to assess all elements of the project Identify most critical elements and improvements necessary to achieve project goals Develop plan with electrical and HVAC experts for requirements, building changes, etc. Review plans and obtain approvals from CHC and CPC, and HDC for exterior modifications</p>	
Electrical Upgrades	
Phase I -- Upgrade electric service from 200 amp to 400 amp	\$ 42,000
<p>Install new service conductors cables from pad mount transformer to Wright Tavern Install outdoor rated 400 amp main service switch and meter on exterior corner Install grounding system, with excavating trenches for new underground conduits Remove old 200 amp circuit breaker panel and meter socket, recycle disposal Install 400 amp distribution circuit breaker cabinet inside building basement Reconnect existing circuits to newly installed 400 amp breaker panels</p>	
Phase II -- Bring current wiring up to code where approved	\$ 35,000
<p>Assess existing wire connections in basement ceiling Determine where active wiring can be replaced with MC cable to meet code Install new MC feeder cables to 3rd floor, replace sub panel, rewire circuits Cap and remove all inactive wiring, including phone wiring, from basement Run cables to light fixtures where approved by Historical Commission Remove knob-and-tube distribution wiring where needed and desired Install cables and new light fixtures to establish new lights in exhibit rooms Remove old sub-standard circuit breaker panels and cables, refeed circuits as needed Install plug sockets where approved by architects and Historical Commission Upgrade ceiling light fixtures in 2nd floor offices</p>	
Install new Heating, Ventilation and Air-Conditioning Systems	
Phase I -- First Floor HVAC	\$ 48,000
<p>Develop plan for location of condensers, ducts and piping to service first floor Work with WTLT to obtain approval from Historical Commission Remove as planned existing heating and cooling systems, patch to match Install Unico High velocity air handler systems in basement Install heating and cooling coils piping and vents to basement and first floor Pair system with 5 Ton Bosch Bova heat pump condenser Work with electrician to assure all electrical servicing is integrated with the new HVAC systems Create separate zones for handling air flow, number to be determined Clean all work site and recycle unused items and rubbish</p>	
Phase II - Second Floor HVAC	\$ 48,000
<p>The tasks for the second floor will essentially be the same as the first floor Work with WTLT to obtain approval from Historical Commission Focus will be on using the 3rd floor for servicing the second floor offices Install Unico System in attic (3rd floor), installing piping and vents to 3rd floor and second floor Pair system with 5 Ton Bosch Bova heat pump condenser in 3rd floor Clean all work site and recycle unused items and rubbish</p>	
Finish work for installation of HVAC and electrical fixtures	\$ 22,000
<p>Finish all air handling ducts in first and second floor to be integrated with floor layouts Paint and repair as needed all ceilings, floors or walls impacted by installation Paint and repair as needed all ceilings, floors or walls impacted by installation Purchase of light fixtures to support interior decoration design</p>	
Contract Management, Permit fees and Approvals	\$ 10,000
<p>Administrative services to monitor projects and provide reports to CPC Support to obtain approval from Concord Historical Commission by architects, others Fees associated with permits</p>	
Contingency for unplanned work requirements (15% of total)	\$ 30,000
Total Requested funds	\$ 250,000



Community Preservation Committee Grant Proposal

Wright Tavern

September 19th, 2025

Feasibility Assessment

According to the contractors we solicited to develop the plans and budgets for this proposal, this project is mostly a very customary project. Installing HVAC systems and improving wiring in historic homes is not unusual for many contractors in this area. However, this work will be done within a building that is almost 300 years old, where there are preservation standards and guidelines to comply with, and this needs to remain an active building during construction. The potential contractors understand these requirements and offered some important factors to consider in this project. The primary factors leading to this being a feasible project are:

1. **Voting Support** - There is significant demand for this building to be preserved and open to the public. Therefore, there should be strong support when requesting the town citizens to vote favorably when it is considered at the annual Town Meeting.
2. **Electricity** - The piping between the electric transformer for the block area is large enough to install cables to support the additional electricity. New trenches to the building will not be needed. And, there is sufficient power available from the town for the Tavern's use. This was determined by an onsite visit by the town wiring inspector, Jack Alesse, members of the Building Department and our potential electrician.
3. **Impact on Historic Elements** - The areas within the building that are used by the public are on the first and second floors. The first is the public museum area and the second floor is offices for currently two non-profit organizations (Robbins House and Freedom's Way). In order to install air-flow vents, there will be no need to put pipes within the walls. Instead, the first floor can be accessed from the basement,

and the second floor can be accessed from the third floor attic. This will minimize any disruption to the historic elements of the building. We may be able to use current ceiling vents on the second floor as well. Finally, we know what and where the historic elements of the building are from the Preservation Restriction Agreement.

4. **First Parish Support** - First Parish in Concord, who owns the building, is highly supportive of our actions to reduce reliance on fossil fuels. There currently is a task force of congregants looking for ways to improve the energy productivity of all buildings on the First Parish campus. Our project to install a heat-pump based electric system for heating and cooling has significant support from the First Parish community.

5. **Attractiveness to Contractors** -- The Wright Tavern has a unique feature when it comes to attracting highly skilled professionals to work on the building. Many realize the historical significance of the building as well as the marketing potential it has for their firms by being associate with such a high-visibility project. Consequently, we believe that we can find highly experienced professionals to do this work at both a reasonable cost and within the timeframe we desire.



Community Preservation Committee Grant Proposal

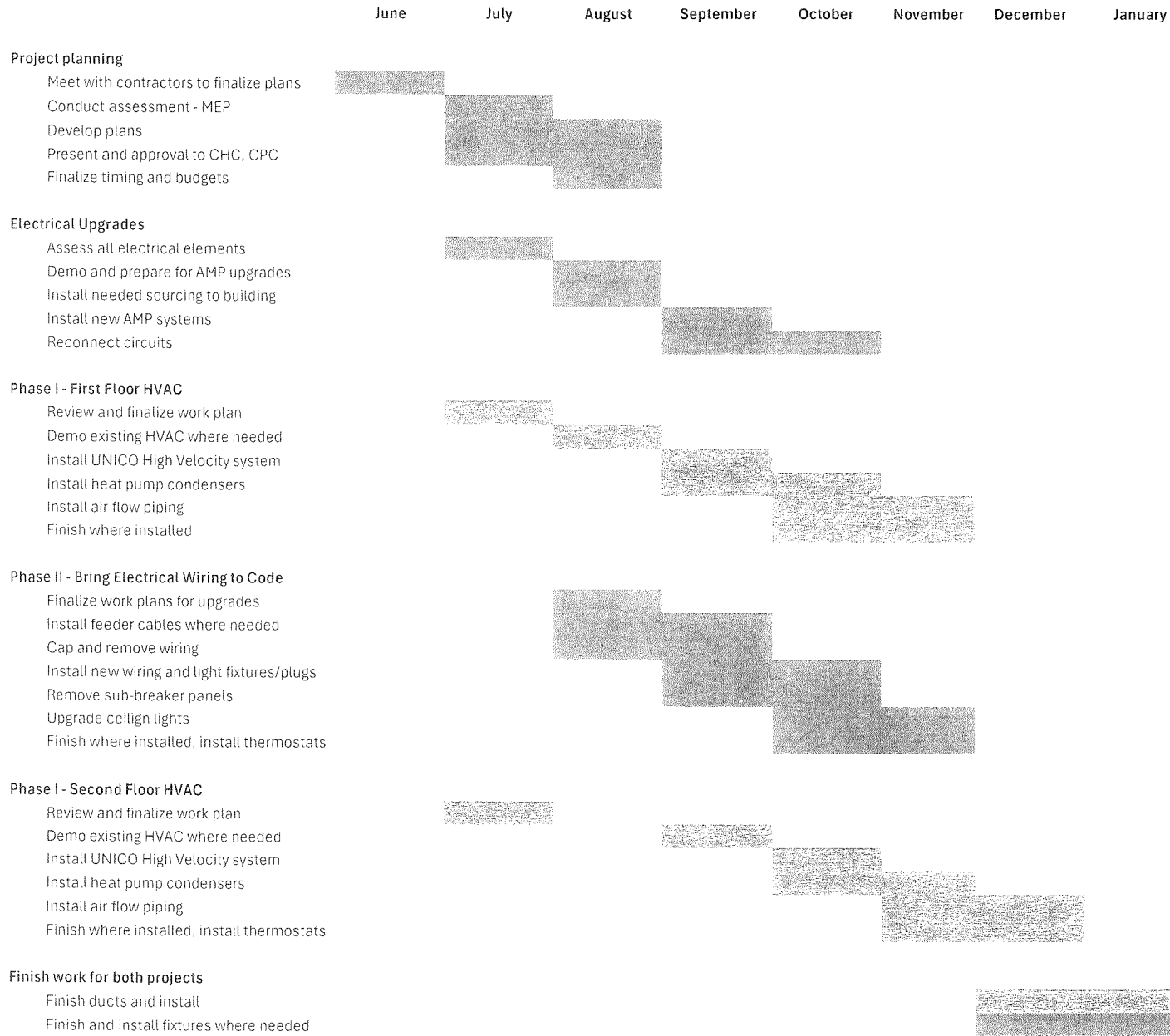
Wright Tavern

September 19th, 2025

Timeline

This will be finalized after the assessment and planning with the contractors. The general timeline we are seeking is the following:

Wright Tavern Energy Improvement Project - Estimated Timelines

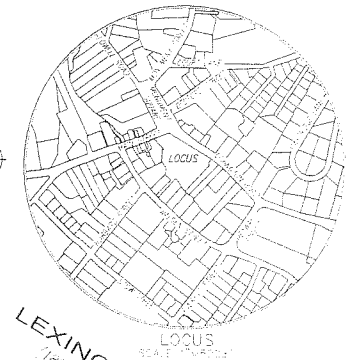


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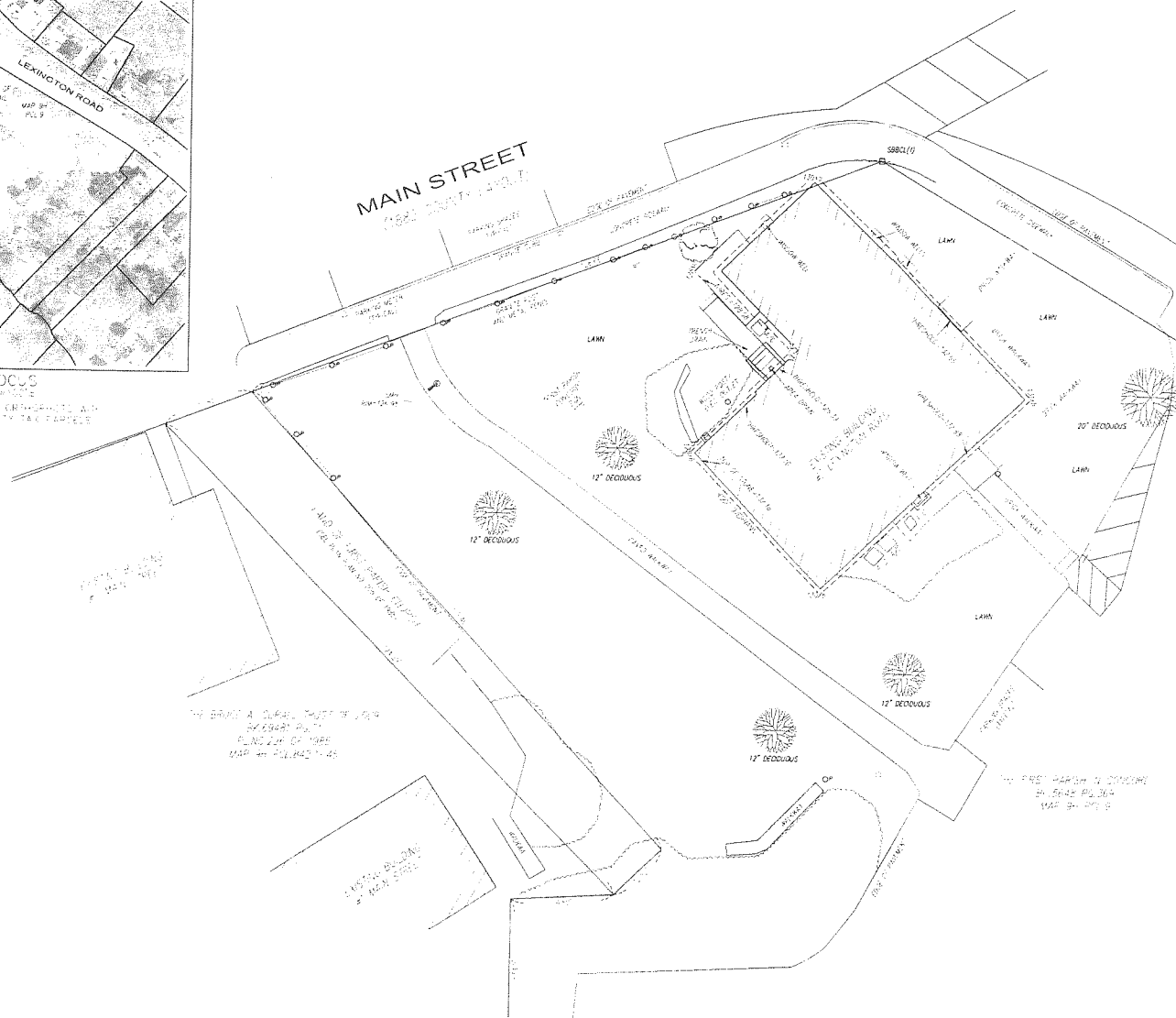


LOT LOCUS
SCALE: 1" = 100'

MASS MAPPER 2010 CORRECTED WITH
ASSESSOR PROPERTY TAX TABLES



LOCUS
SCALE: 1" = 1000'
LEXINGTON ROAD
1782 COUNTY LAYOUT



LEGEND

EXIST. FEATURE	DESCRIPTION	EXIST. SYMB	DESCRIPTION
---	PROPERTY LINE	---	EXISTING TELEPHONE POLE
---	ADJUTER LINE	---	EXISTING WATER MAIN
---	PAVE-OR-HOT LINE	---	EXISTING SEWER MANHOLE
---	WATER FENCE	---	EXISTING WATER GATE VALVE
---	WIRE FENCE	---	EXISTING GAS GATE VALVE
---	WET POND	---	EXISTING HOV POLE
---	STONE RETAINING WALL	---	EXISTING SHAL POLE
---	STONE WALL	---	EXISTING PVA POLE
---	EXISTING CONTOUR (INDEX)	---	EXISTING CONCRETE BOUND
---	EXISTING CONTOUR (INTERPOLATED)	---	EXISTING STONE BOUND
---	EXISTING SPOT ELEVATION	---	EXISTING SPOT DRIVE
---	EXISTING BUILDING	---	EXISTING SIGN
---	DECIDUOUS TREE	---	EXISTING WATER SHUT OFF
---	CONIFER TREE	---	POLE LINE
---		---	DRIVE

GENERAL NOTES:

1. TOPOGRAPHIC INFORMATION SHOWN ON THIS PLAN WAS PREPARED BY DILLIS & ROY CIVIL DESIGN GROUP, INC. BASED ON AN ON-THE-GROUND SURVEY PERFORMED IN JANUARY 2005. ELEVATIONS ARE REFERENCED TO NAVD 83.
2. PROPERTY LINE INFORMATION SHOWN ON THIS PLAN WAS PREPARED BY DILLIS & ROY CIVIL DESIGN GROUP, INC. BASED ON AN ON-THE-GROUND SURVEY PERFORMED IN JANUARY 2005 AND RECORDED PLANS AND DEEDS.
3. THE AREA AROUND THE WRIGHT TAVERN DOES NOT FALL WITHIN A FLOOD ZONE AS SHOWN ON THE FLOOD INSURANCE RATE MAP 2501700378F FOR THE TOWN OF CONCORD.
4. EXISTING UTILITIES SHOWN ON THIS PLAN WERE COMPILED FROM FIELD INVESTIGATION AND RECORDED PLANS. THE UTILITIES SHOWN ON THIS PLAN ARE FOR REFERENCE ONLY AND SHOULD NOT BE ASSUMED TO BE CORRECT UNLESS SHOWN OTHERWISE. THE CONTRACTOR SHALL CALL ENG SAFE "BIT" PRIOR TO CONSTRUCTION IN ACCORDANCE WITH STATE LAWS.

REFERENCES:

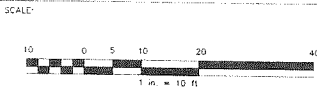
- DEED BOOK 5648 PAGE 359
- PLAN 225 OF 1985
 PLAN 1143 OF 1980
 PLAN 1091 OF 1977
 PLAN 836 OF 1974
 PLAN 826 OF 1967
 PLAN 451 OF 1949
 PLAN 496 OF 1946
- LAND COURT 22895A
 LAND COURT 22875B
 LAND COURT 22875A
 LAND COURT 15897A
- COUNTY LAYOUT 1935
 COUNTY LAYOUT 1923
 COUNTY LAYOUT 1909
 COUNTY LAYOUT 1895
 COUNTY LAYOUT 1882

DILLIS & ROY
 CIVIL DESIGN GROUP

SOIL ENGINEERS LAND SURVEYORS DESIGN CONSULTANTS
 CORPORATE OFFICE CONCORD OFFICE
 1 MAIN STREET, SUITE 1 978-779-6091 100 MAIN ST., SUITE 310
 LUNENBURG, MA 01462 www.dillisandroy.com CONCORD, MA 01742

OWNER: WRIGHT TAVERN LEGACY TRUST
 2 LEXINGTON ROAD
 CONCORD, MA

APPLICANT: WRIGHT TAVERN LEGACY TRUST
 2 LEXINGTON ROAD
 CONCORD, MA



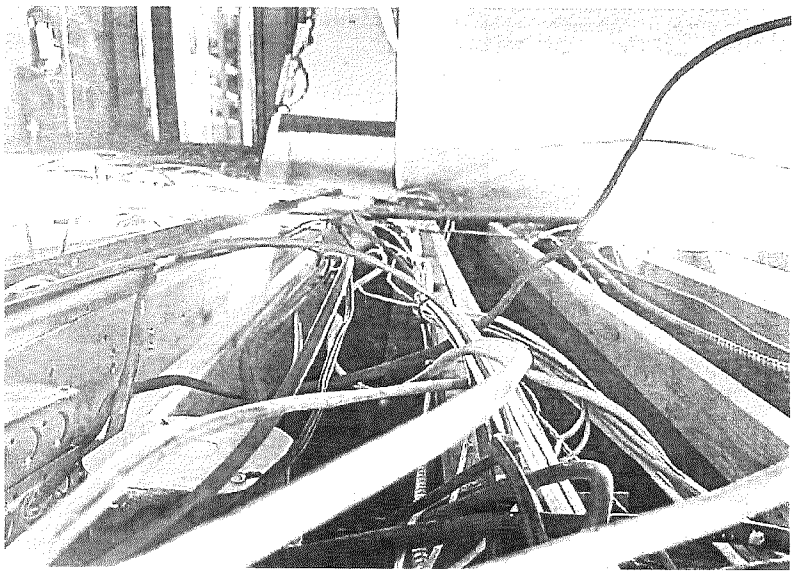
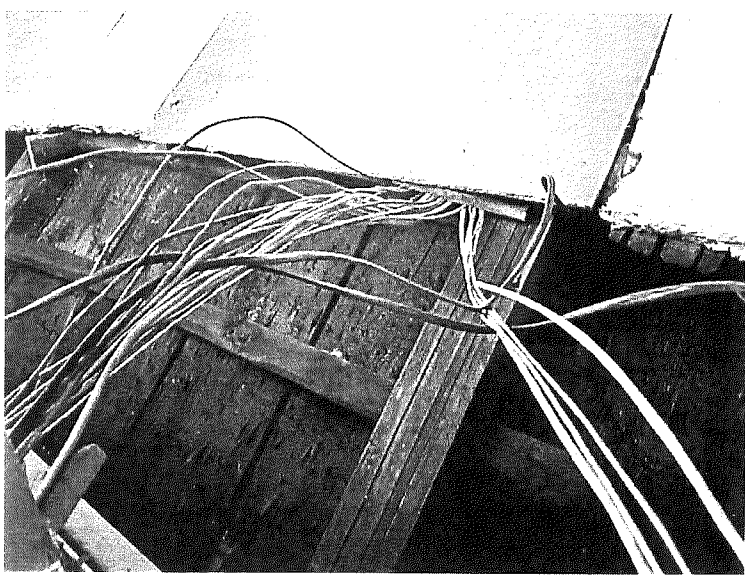
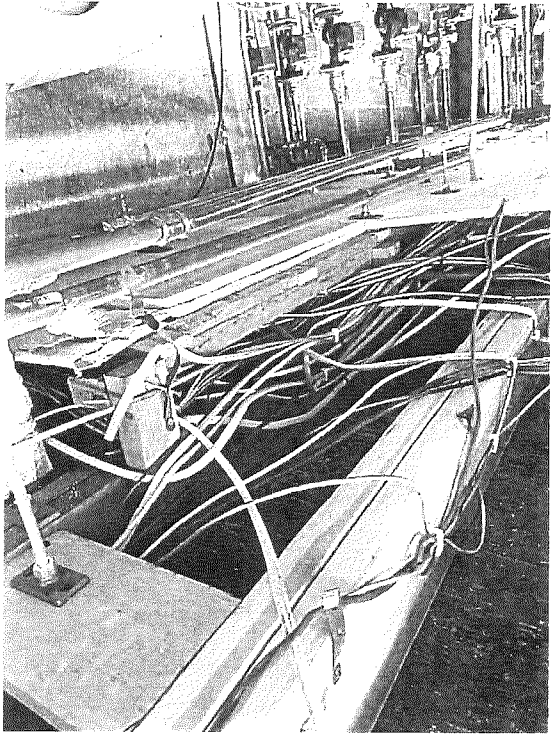
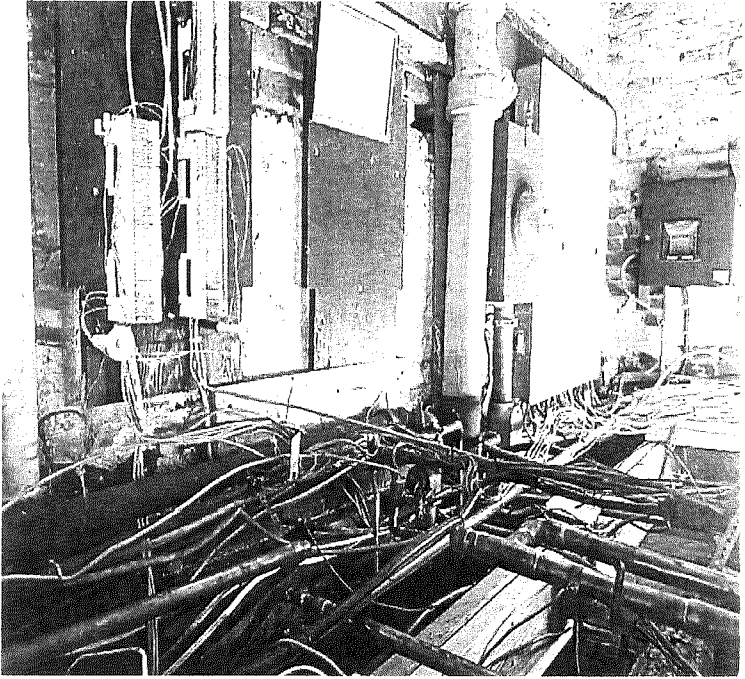
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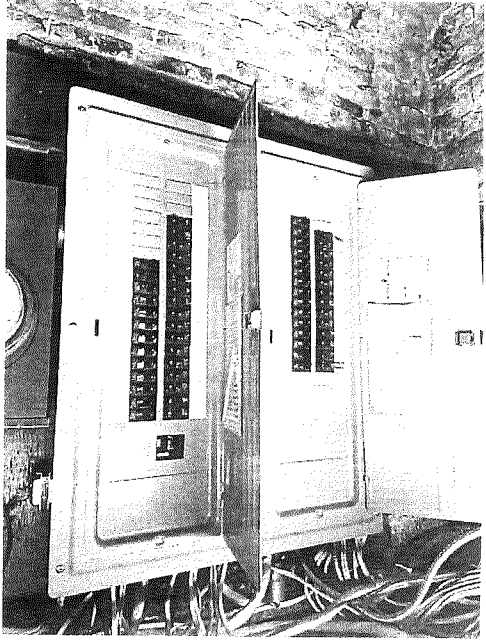
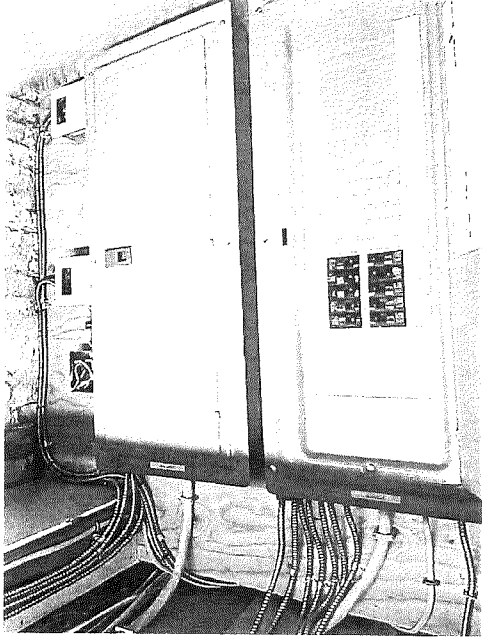
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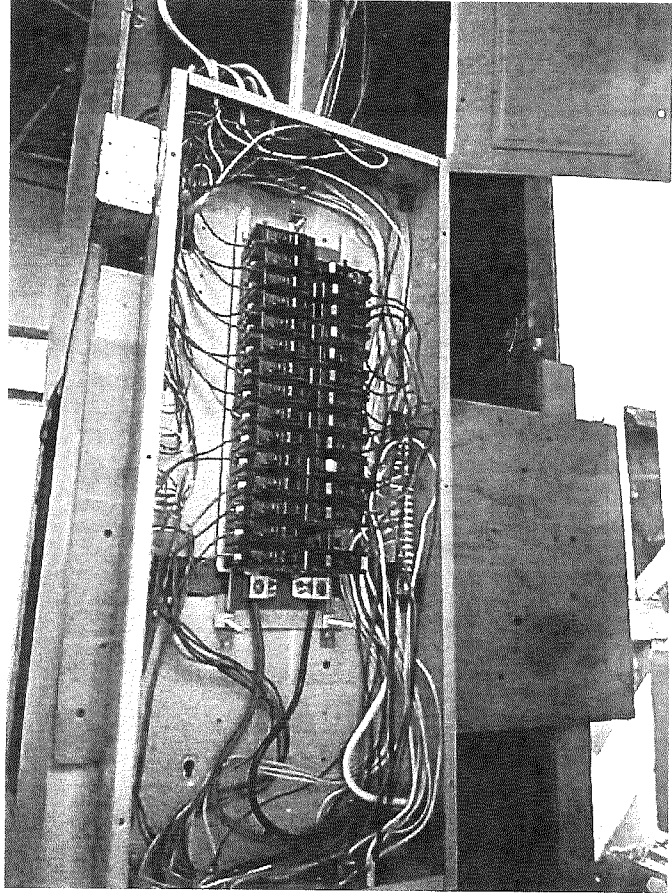
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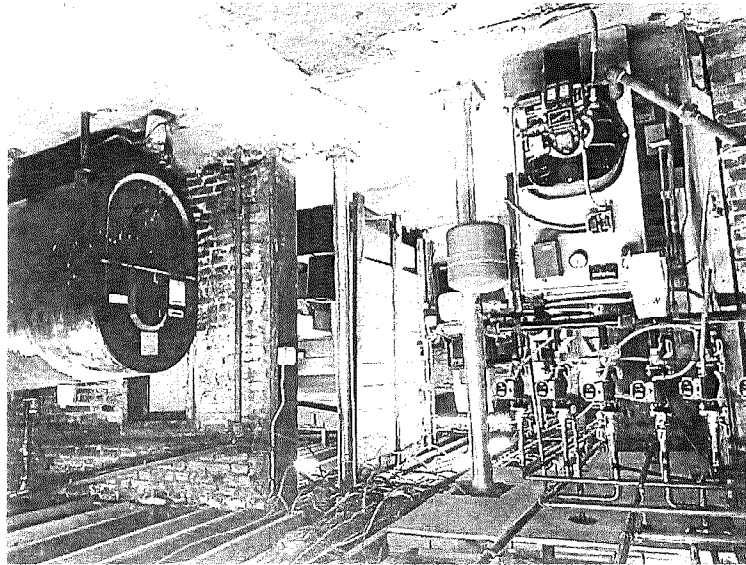
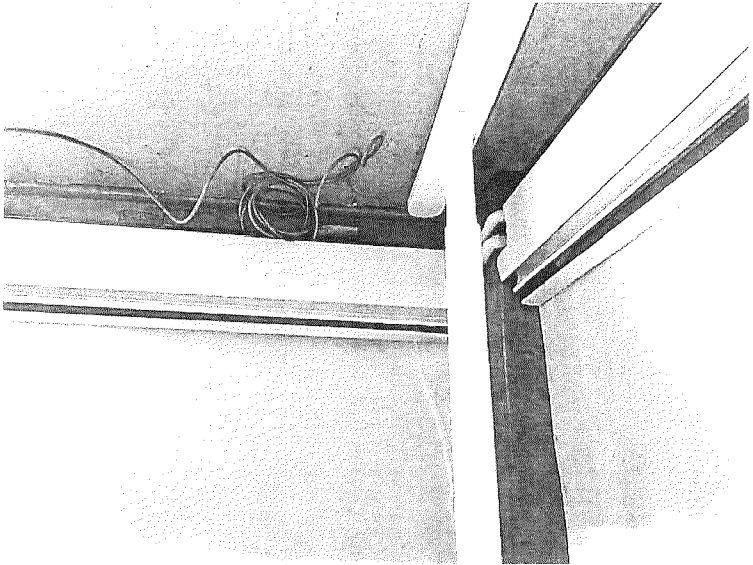
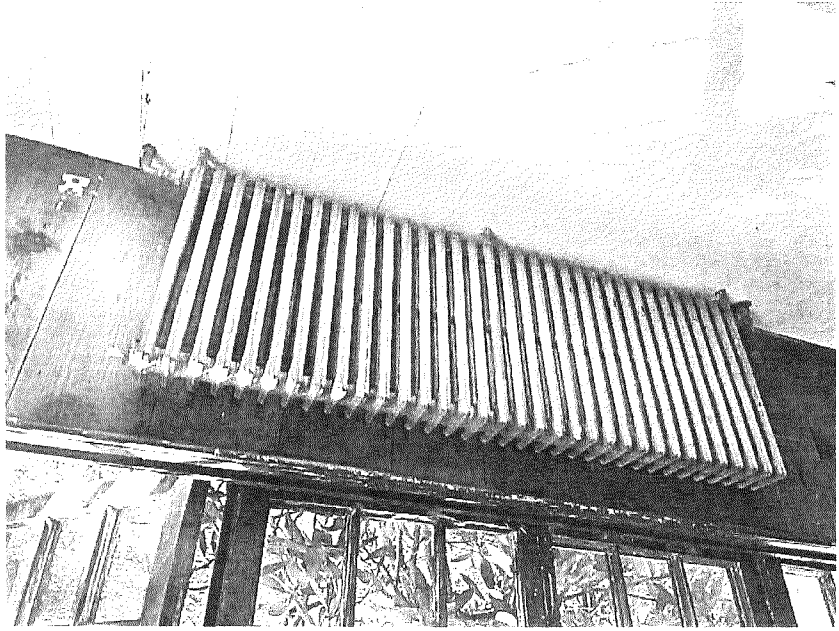


Electrical Wiring Current Conditions

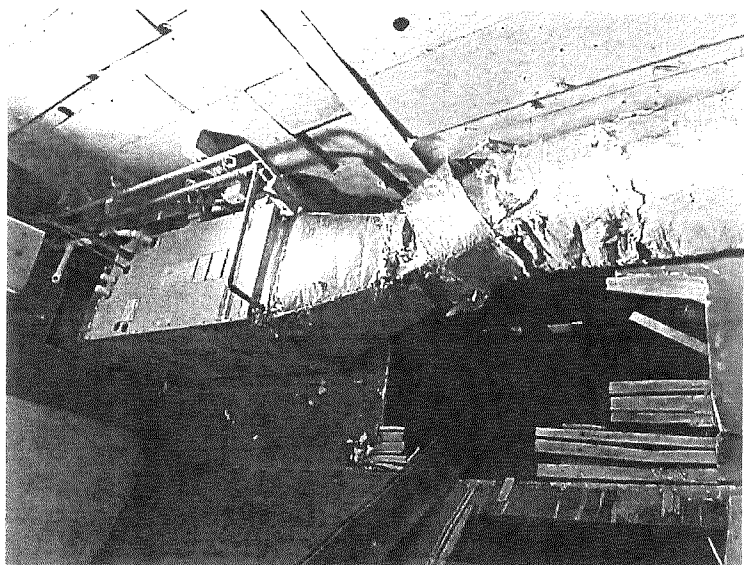
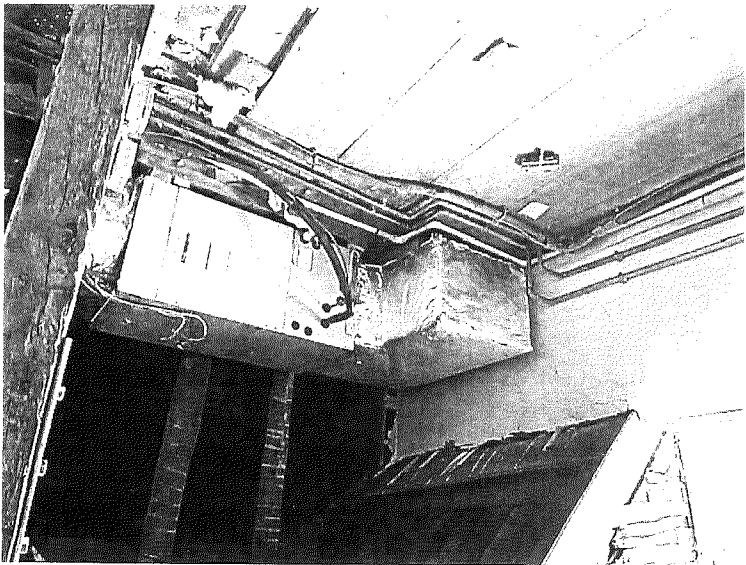
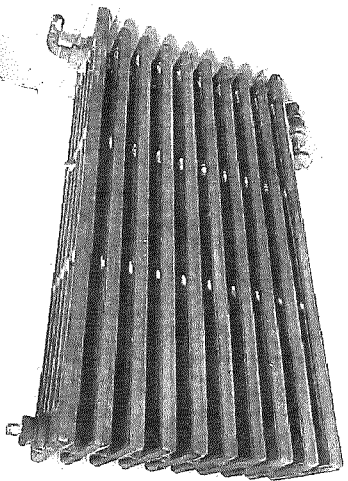
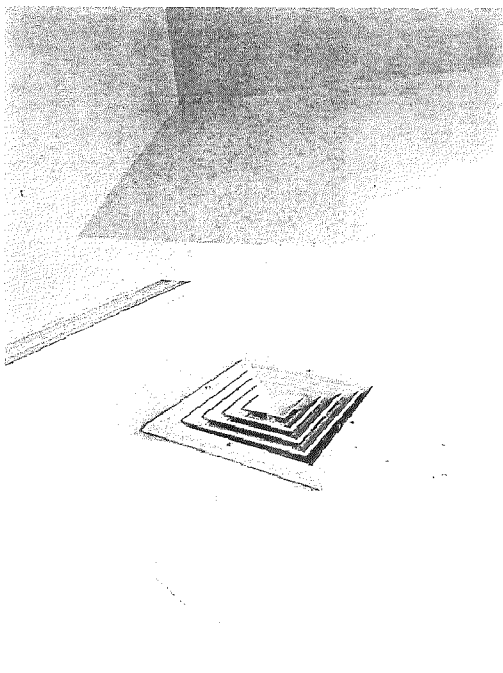
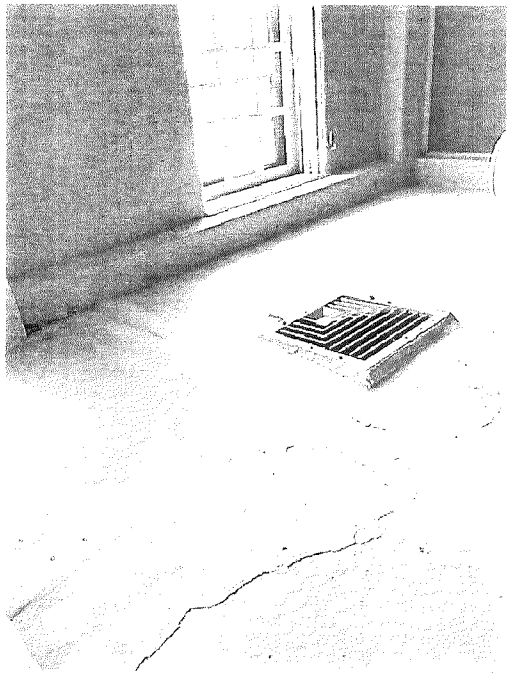
Updated
circuit
breaker
boxes



Circuit breaker box on 3rd
floor



Heating and Air-Conditioning Current Conditions



Heating and Air-Conditioning Current Conditions

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Department of the Treasury
Internal Revenue Service
Tax Exempt and Government Entities
P.O. Box 2508
Cincinnati, OH 45201

THE WRIGHT TAVERN LEGACY TRUST
C/O FIRST PARISH OF CONCORD
20 LEXINGTON ROAD
CONCORD, MA 01742-2525

Date:
07/25/2022
Employer ID number:
87-3687449
Person to contact:
Name: Micheal Hock
ID number: 32240
Telephone: 877-829-5500
Accounting period ending:
December 31
Public charity status:
509(a)(3)
Form 990 / 990-EZ / 990-N required:
Yes
Effective date of exemption:
April 4, 2022
Contribution deductibility:
Yes
Addendum applies:
No
DLN:
26053440004352

Dear Applicant:

We're pleased to tell you we determined you're exempt from federal income tax under Internal Revenue Code (IRC) Section 501(c)(3). Donors can deduct contributions they make to you under IRC Section 170. You're also qualified to receive tax deductible bequests, devises, transfers or gifts under Section 2055, 2106, or 2522. This letter could help resolve questions on your exempt status. Please keep it for your records.

Organizations exempt under IRC Section 501(c)(3) are further classified as either public charities or private foundations. We determined you're a public charity under the IRC Section listed at the top of this letter.

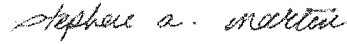
Specifically, we determined you're a Type I supporting organization under IRC Section 509(a)(3). A Type I supporting organization is operated, supervised, or controlled by one or more publicly supported charities.

If we indicated at the top of this letter that you're required to file Form 990/990-EZ/990-N, our records show you're required to file an annual information return (Form 990 or Form 990-EZ) or electronic notice (Form 990-N, the e-Postcard). If you don't file a required return or notice for three consecutive years, your exempt status will be automatically revoked.

If we indicated at the top of this letter that an addendum applies, the enclosed addendum is an integral part of this letter.

For important information about your responsibilities as a tax-exempt organization, go to www.irs.gov/charities. Enter "4221-PC" in the search bar to view Publication 4221-PC, Compliance Guide for 501(c)(3) Public Charities, which describes your recordkeeping, reporting, and disclosure requirements.

Sincerely,



Stephen A. Martin
Director, Exempt Organizations
Rulings and Agreements

Request for Taxpayer Identification Number and Certification

Give Form to the
 requester. Do not
 send to the IRS.

▶ Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type. See Specific Instructions on page 3.	<p>1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. WRIGHT TAVERN LEBACY TRUST</p>	
	<p>2 Business name/disregarded entity name, if different from above</p>	
	<p>3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes.</p> <p> <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> C Corporation <input type="checkbox"/> S Corporation <input type="checkbox"/> Partnership <input checked="" type="checkbox"/> Trust/estate <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ▶ _____ <small>Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.</small> <input type="checkbox"/> Other (see instructions) ▶ _____ </p>	<p>4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):</p> <p>Exempt payee code (if any) _____</p> <p>Exemption from FATCA reporting code (if any) _____</p> <p><small>(Applies to accounts maintained outside the U.S.)</small></p>
	<p>5 Address (number, street, and apt. or suite no.) See instructions. 2 LEXINGTON ROAD</p>	<p>Requester's name and address (optional)</p>
	<p>6 City, state, and ZIP code CONCORD, MA 01742</p>	
	<p>7 List account number(s) here (optional)</p>	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number									
or									
Employer identification number									
8	7	-	3	6	8	7	4	4	9

Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign Here	Signature of U.S. person ▶ Tom Wilson	Date ▶ Sept 13, 2025
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General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding, later.

Statement of Financial Position

Wright Tavern Legacy Trust

As of September 18, 2025

DISTRIBUTION ACCOUNT	TOTAL
Assets	
Current Assets	
Bank Accounts	
Business Blue Checking (8165) - 1	76,849.03
Fidelity Investments	4,849.94
Total for Bank Accounts	\$81,698.97
Accounts Receivable	
Accounts & Grants Receivable	369.00
Grants Receivable	
Total for Accounts Receivable	\$369.00
Other Current Assets	
Cash on Hand	339.00
Due from Employee	
Inventory	15,818.79
Payments to deposit	
Prepaid expenses	184.27
Retainers	
WIP - New Entrance	11,873.20
WIP-Refreshment Center	161,032.32
Total for Other Current Assets	\$189,247.58
Total for Current Assets	\$271,315.55
Fixed Assets	
Computers & Equipment	
	4,690.94
Furniture & Fixtures	
	55,919.69
Leasehold Improvements	
	\$514,633.88
A/A Leasehold Improvements	-4,455.60
Total for Leasehold Improvements	\$510,178.28
Right-of-Use Asset - Operating Lease	356,657.00
Total for Fixed Assets	\$927,445.91
Other Assets	
Total for Assets	\$1,198,761.46

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Statement of Financial Position

Wright Tavern Legacy Trust

As of September 18, 2025

DISTRIBUTION ACCOUNT	TOTAL
Liabilities and Equity	
Liabilities	
Current Liabilities	
Accounts Payable	
Accounts Payable (A/P)	7,812.95
Total for Accounts Payable	\$7,812.95
Credit Cards	
Chase VISA 7709	969.82
Total for Credit Cards	\$969.82
Other Current Liabilities	
Accrued Expenses	13,500.00
Deferred Revenue	
Due to Related Party	80,808.00
Massachusetts Department of Revenue Payable	373.18
Sales tax to pay	218.00
Total for Other Current Liabilities	\$94,899.18
Total for Current Liabilities	\$103,681.95
Long-term Liabilities	
Long-term business loans	30,000.00
Right-of-Use Liability - Operating Lease	369,256.00
Security Deposits from Tenants	850.00
Total for Long-term Liabilities	\$400,106.00
Total for Liabilities	\$503,787.95
Equity	
Opening balance equity	58,115.00
Retained Earnings - Donor Restricted	130,000.00
Retained Earnings - Unrestricted	371,194.65
Net Income	135,663.86
Total for Equity	\$694,973.51
Total for Liabilities and Equity	\$1,198,761.46

Statement of Activity
Wright Tavern Legacy Trust
January 1-September 18, 2025

DISTRIBUTION ACCOUNT	TOTAL
Income	
Contributed income	0
Donations - Board	2,500.00
Government grants & contracts	131,841.13
Individual Donations	63,401.08
In-kind donations	978.65
Total for Contributed income	\$198,720.86
Events Income	\$25,481.39
Revenue Sharing 250th	5,472.76
Total for Events Income	\$30,954.15
Office Rental Income	13,500.00
Sales	0
Sales of Product Revenue	7,791.90
Total for Sales	\$7,791.90
Services	\$423.04
Room Rentals	2,977.00
Tours	15,948.91
Total for Services	\$19,348.95
Unapplied Cash Payment Revenue	
Total for Income	\$270,315.86
Cost of Goods Sold	
Cost of Goods Sold	\$3,798.31
Merchant account fees	2,713.44
Sales Tax Expense	135.43
Shipping	221.25
Total for Cost of Goods Sold	\$6,868.43
Total for Cost of Goods Sold	\$6,868.43
Gross Profit	\$263,447.43
Expenses	
Advertising & marketing	0
Marketing & Promotions	29,694.34
Total for Advertising & marketing	\$29,694.34
Contract & professional fees	0
Accounting fees	10,500.00
Consultants	31,982.50
Docents	12,990.00
Legal fees	155.00
Tech Fees	1,199.75
Website maintenance	4,500.00
Total for Contract & professional fees	\$61,327.25

Statement of Activity

Wright Tavern Legacy Trust

January 1-September 18, 2025

DISTRIBUTION ACCOUNT	TOTAL
Events Expense	0
Alcohol for resale	2,649.89
Bartenders	4,793.25
Catering	400.00
Equipment Rentals	868.25
Food for resale	4,573.85
Honoraria	3,020.00
Hospitality	1,367.93
Licenses	546.60
Non-alcoholic beverages for resale	147.80
Signage & other	5,942.91
Space Rental	290.00
Total for Events Expense	\$24,600.48
Insurance	0
Directors & officers insurance	349.02
Liability insurance	3,370.36
Total for Insurance	\$3,719.38
Occupancy	0
Cleaning	1,811.50
Total for Occupancy	\$1,811.50
Office expenses	0
Bank fees & service charges	7.52
Internet & TV services	809.55
Memberships & subscriptions	150.00
Office supplies & equipment	1,048.76
Printing & photocopying	150.88
Registration & Filing Fees	639.00
Shipping & postage	14.01
Software & apps	585.62
Total for Office expenses	\$3,405.34
Supplies	0
Supplies & materials	5,968.43
Total for Supplies	\$5,968.43
Total for Expenses	\$130,526.72
Net Operating Income	\$132,920.71
Other Income	
Interest Income	2,743.15
Total for Other Income	\$2,743.15

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Statement of Activity
Wright Tavern Legacy Trust
January 1-September 18, 2025

DISTRIBUTION ACCOUNT	TOTAL
Other Expenses	
Net Other Income	\$2,743.15
Net Income	\$135,663.86