



What You Need to Know if Your Organization Plans to Apply for Tax Exemption

The questions that follow will enable you to determine whether an organization is eligible to apply for recognition of exemption from Federal income taxation under § 501(a) of the Internal Revenue Code and, if so, how to proceed.

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If you want to see an in-depth discussion of the exemption requirements under § 501(a) of the Code, rather than going through a step-by-step analysis of an organization's eligibility to apply for recognition of exemption from Federal income taxation, see [Types of Exempt Organizations](#) or download IRS [Publication 557, Tax Exempt Status For Your Organization](#).

First Things First. Does The Organization Have an Appropriate Legal Form?

For the Internal Revenue Service (the IRS) to recognize an organization's exemption, the organization must be organized as a trust, a corporation, or an association.

Is the organization a trust, corporation or association?

[Yes](#) | [No](#)

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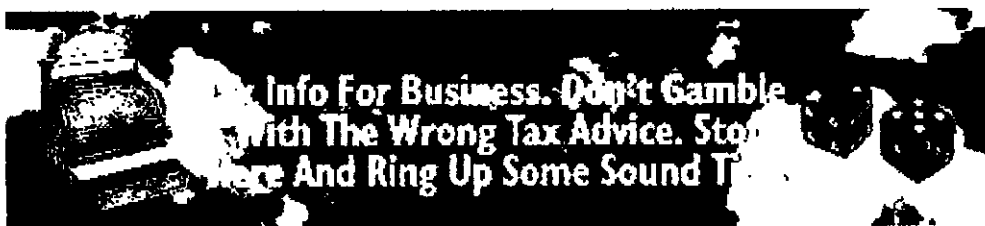
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Have You Completed and Signed the Correct Application?

For the IRS to recognize an organization's exemption, it must submit a completed, signed and dated application with the appropriate user fee. If an organization is seeking recognition of exemption under § 501(c)(3) of the Code, it must complete and file Form 1023, Application for Recognition of Exemption. Most other tax-exempt organizations must complete and file Form 1024, Application for Recognition of Exemption Under Section 501(a) or for Determination Under Section 120. A list of types of tax-exempt organizations and the respective application forms to file is set out near the end of Publication 557.

Have you answered all questions in Parts I through IV and only those schedules that apply to the organization?

Yes | No

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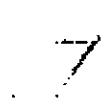
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Types of Tax-Exempt Organizations

The major classifications of organizations that might qualify to be recognized by the IRS as exempt from Federal income tax.

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Charitable Organizations

Charitable, religious, educational, scientific, literary, etc. organizations.

Social Welfare Organizations

Civic leagues, community organizations, etc.

Labor and Agricultural Organizations

Labor unions, farm bureaus, etc.

Business Leagues

Trade associations, chambers of commerce, real estate boards, etc.

Social Clubs

Hobby clubs, country clubs, etc.

Fraternal Societies

Lodges and similar orders and associations.

Veterans' Organizations

Posts or organizations of past or present members of the Armed Forces of the United States.

Employees' Associations

Voluntary employees' benefit associations and local associations of employees.

Political Organizations

Campaign committees, political parties, and political action committees.

Other Tax-Exempt Organizations

Miscellaneous types of organizations that qualify for exemption from Federal income tax.

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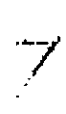
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Tax Info For Business

Have You Completed and Signed the Correct Application?

Has the organization been in existence for at least three tax years?

[Yes](#) | [No](#)

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A Conformed Copy

A conformed copy, as defined in § 3.03 Of Rev. Proc. 68-14, 1968-1 C.B. 768, is a copy that agrees with the original and all amendments to it. If the original document required a signature, the copy should either be signed by a principal officer or, if not signed, be accompanied by a written declaration signed by an authorized officer of the organization. With either option, the officer must certify that the document is a complete and accurate copy of the original.

Have you included a conformed copy of the organization's organizing document?

[Yes](#) | [No](#)

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Tax Info For Business

Have You Completed and Signed the Correct Application?

Have you attached [Form 8718](#), *User Fee for Exempt Organization Determination Letter Request* along with the appropriate user fee * in a check or money order made payable to the Internal Revenue Service in U.S. dollars?

Yes | No

* The correct fee is \$500 or, in certain limited circumstances, \$150. See [Form 8718](#) for further details.

(Note that the Congress has mandated that the IRS collect a fee for this application. Therefore the IRS cannot waive the user fee.)

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Tax Info For Business

You are now ready to submit the organization's completed application to one of the following addresses:

Internal Revenue Service
P.O. Box 192
Covington, KY 41012-0192

Applications shipped by express mail or delivery service should be sent to:

Internal Revenue Service
201 W. Rivercenter Blvd.
Attn: Extracting Stop 312
Covington, Ky. 41011

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Power of Attorney

You must complete a [Form 2848](#), *Power of Attorney and Declaration of Representative*, authorizing the attorney or agent to represent you. Have you completed a Form 2848 and attached it to your application?

[Yes](#) | [No](#)

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Power of Attorney

Until the IRS receives a completed Form 2848, it may not discuss your application with your attorney or agent.

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Tax Info For Business

Not Eligible for Exemption

No, the organization is **not yet eligible to apply** for recognition of exemption under § 501(a) of the Code as an exempt organization.

You may wish to consult a tax advisor or the IRS.

Click [here](#) for the address of the IRS Customer Service location nearest you.

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Types of Tax-Exempt Organizations

The major classifications of organizations that might qualify to be recognized by the IRS as exempt from Federal income tax.

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Charitable Organizations

Charitable, religious, educational, scientific, literary, etc. organizations.

Social Welfare Organizations

Civic leagues, community organizations, etc.

Labor and Agricultural Organizations

Labor unions, farm bureaus, etc.

Business Leagues

Trade associations, chambers of commerce, real estate boards, etc.

Social Clubs

Hobby clubs, country clubs, etc.

Fraternal Societies

Lodges and similar orders and associations.

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Employees' Associations

Voluntary employees' benefit associations and local associations of employees.

Political Organizations

Campaign committees, political parties, and political action committees.

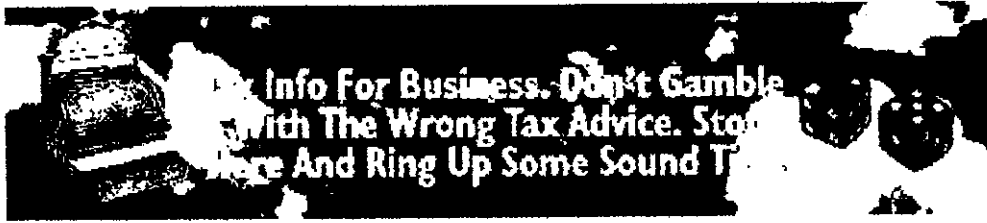
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Miscellaneous types of organizations that qualify for exemption from Federal income tax.

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Tuesday, 11-Feb-97 12:55:55 EST



Definition of an Association

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In general, an association is a group of persons banded together for a specifically defined purpose. To qualify under § 501(a), the association must have a written document, such as "Articles of Association," showing its creation which must be signed by at least two persons, and must be dated.

The definition of an association can vary under state law. You may wish to consult the law of the state in which the organization intends to be organized. Note that in order for an association to qualify under § 501(c)(3) of the Code, its Articles of Association must contain certain mandatory language. [Publication 557](#) contains [suggested language](#).

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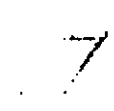
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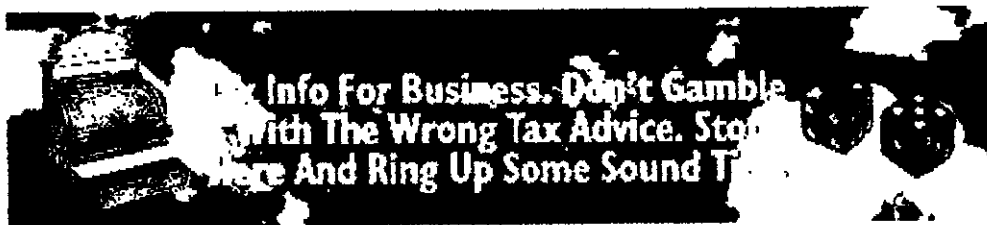
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Charitable Organizations

Charitable, religious, educational, scientific, literary, etc. organizations that meet the requirements of § 501(c)(3) are exempt from federal income tax.

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Exemption Requirements

A brief description of the requirements for exemption under § 501(c)(3).

Application for Recognition of Exemption

How to apply for recognition of exemption as a § 501(c)(3) organization.

Filing Requirements

A brief description of the annual filing and disclosure requirements for charitable organizations.

Private Foundation

Charitable organizations are considered private foundations unless they meet certain requirements. A brief explanation of these requirements and the effect of private foundation status when these requirements are not met.

Unrelated Business Income Tax

Charitable organizations engaged in an unrelated trade or business are subject to the unrelated business income tax.

Contributions

A brief description of the disclosure and substantiation requirements for contributions to charitable organizations.

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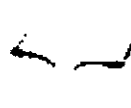
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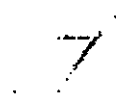
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Exemption Requirements - § 501(c)(7)

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A social club is organized for pleasure, recreation, and other similar non-profitable purposes and substantially all of its activities are for these purposes. The organization will not be recognized as tax exempt if its charter, bylaws, or other governing instrument, or any written policy statement contains a provision that provides for discrimination against any person on the basis of race, color, or religion. However, a club which in good faith limits its membership to the members of a particular religion in order to further the teachings or principles of that religion and not to exclude individuals of a particular race or color will not be considered as discriminating on the basis of religion. To be exempt, personal contact, commingling, and fellowship must exist among members. Members must be bound together by a common objective directed toward pleasure, recreation, and other non-profitable purposes. Fellowship need not be present between each member and every other member of a club if it constitutes a material part in the life of the organization. A statewide or nationwide organization that is made up of individual members, but is divided into local groups, satisfies this requirement if fellowship constitutes a material part of the life of each local group.

The membership in a social club must be limited. A social club that issues corporate membership is dealing with the general public in the form of the corporation's employees. Corporate members of a club are not the kind of members contemplated by the statute. Evidence that your club's facilities will be open to the general public (persons other than members or their dependents or guests) may cause denial of exemption. This does not mean, however, that any dealing with outsiders will automatically deprive a club of exemption.

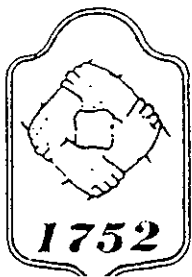
In general, a club should be supported solely by membership fees, dues, and assessments. A § 501(c)(7) organization is permitted to receive up to 35% of its gross receipts, including investment income, from sources outside of its membership without losing its tax-exempt status. Of the 35%, not more than 15% of the gross receipts may be derived from the use of the club's facilities or services by the general public or from other activities not furthering social or recreational purposes for members. If an organization has outside income that exceeds these limits, all the facts and circumstances will be taken into

1752 Club elects Walsh president



1752 CLUB OFFICERS

The 1752 Club recently installed its 1997-1998 slate of officers. Pictured (left to right): Robert Motta, Arbella Protection, secretary; Stephen Emma, Union Mutual, treasurer; Joanna Walsh, Worcester Insurance Co., president; and John Barry, EMC Companies, vice president.



New England 1752 Club

137 Pennsylvania Avenue ♦ Framingham, MA 01701

November 1, 1996

Re: Charitable Donation -- McColgan Education Fund

To Whom it May Concern:

John W. McColgan passed away this past May at the age of 49 leaving behind a wife and 4 children. He worked as a marketing representative for the Commercial Union Insurance Company in their Foxborough office for seven years, and in the insurance industry for 22 years. John was graduated from Immaculate Conception Seminary and was a chaplain in the US Army. He was a good friend to many of us.

Of his four children, Jason, Jennifer, Meaghan, and Erin, two are already in college and two are some years away from that expensive time. The McColgan Education Fund was established at the Citizens Bank, Quincy, Massachusetts, by the Commercial Union Insurance Co. and a number of independent insurance agents served by John, to help the family with these educational expenses.

The New England 1752 Club is an association of insurance marketing representatives based in Framingham. John McColgan was an active member of this association and the Club is running a fund raising raffle to contribute to the McColgan Education Fund. We are seeking donations of prizes to attract higher raffle ticket sales. This is where we need your help.

Would you please consider making a donation of your product or service to the New England 1752 Club. Adding your name to the list of prize contributors will surely make our raffle the most successful it can be for John's family.

Thank you for your generosity.

Sincerely yours,

James F. Glasser
McColgan Committee Chairman



NEW ENGLAND 1752 CLUB

Hingham Mutual Ins. Co.
230 Beal St.
Hingham Ma. 02043
JULY 22, 1997

CATHERINE TURCO ABAIE
c/o JAMES & JOHN TURCO INS. AGENCY
944 MAIN ST.
WALPOLE MA. 02081

Dear CATHERINE

The Club has established their meeting dates for 1997. Our first meeting in the Fall will be held on September 5th at Kens Steak House on route 9 in Framingham. The meeting will begin at 10 AM. with a short business meeting and our guest speaker and the introduction of you to the members. We intend to use this opportunity to present you with your scholarship and expense checks and to take some pictures for publicity.

We would like to attend the meeting and join us for lunch as our guest. You will be back on the road by 1:30. Please let me know if you will be able to attend. You can reach me at 1800 341 8200 ext 159. Please leave a message on my voice if I am out of the office. If you should need direction let me know. We are looking to seeing you on the 5th.

Very truly yours

John F. Keaveney
Scholarship Chairman

cc. Kevin Nagle
Brinn J. Cadigan



NEW ENGLAND 1752 CLUB

Hingham Mutual Ins. Co.
230 Beal St.
Hingham Ma. 02043
August 18, 1998

LORRE ROWAN
c/o CHASE INSURANCE AGENCY INC.
49 MAIN ST.
PO BOX 548
WEST HARWICH MA. 02671

Dear LORRE

The Club has established their meeting dates for 1997. Our first meeting in the Fall will be held on September 5th at Fens Steak House on route 9 in Framingham. The meetings will begin at 10 AM with a short business meeting and our guest speaker and the introduction of you to the members. We intend to use this opportunity to present you with your scholarship and expense checks and to take some pictures for publicity.

We would like to attend the meeting and join us for lunch as our guest. You will be back on the road by 1:30. Please let me know if you will be able to attend. You can reach me at 1800 311 8200 ext 159. Please leave a message on my voice if I am out of the office. If you should need direction let me know. We are looking to seeing you on the 5th.

Very truly yours

John F. Keaveney
Scholarship Chairman

cc. Kevin Nagle
Brinn J. Cadigan

◆ What is the 1752 Club? ◆

President's Message

The New Jersey 1752 Club is a professional nonprofit club consisting of members of the insurance industry doing business in New Jersey. The purpose of the club is to further the education of our members, promote ethical practices and to increase social interaction within the insurance community.

The Club holds regular quarterly meetings. At these meetings distinguished professionals from the industry are invited to speak about topical issues. Time is allotted to allow club members to interact freely with the speaker or other club members. These freeform discussions are often a good source of industry information and a great source of additional knowledge to the membership.

There are quite a few advantages to being a member of the NJ 1752 Club. Beyond our educational programs and networking, a member can develop personally and professionally by taking an active leadership role in one of the club's committees or governing officer's positions. All of these items are intended to help the member to be a better field person.

Among our illustrious former members are Leo Hogan, President of Cumberland and George Guptill, President of Franklin Mutual.

Peter J. Elliott

◆ Past Presidents ◆

Steve Reinard '96
Kevin England '95
John Gasparon '94
Fred May '93
Rich Forte '92
Frank Pietrierzk '91
Frank Kelly '90
Betti Christopher '89
Todd Lovell '88
Walter Robinson '87
Jack Landon '86
Steve Catranis '85
Barbara Feinour '84
Henry Thalshimer '83
Sam Zamloot '82
Bob Christie '81
John Eggeston '80
Carl Storer '79
Stephen M. Duncan '78
Leo T. Hogan '77
Charles (Doug) Bullock '76
Francis X. Winterer '75
Harry A. Warburton '74
George H. Guptill '73
Richard M. Hirsh '72
Ray Giordano '71
Bob Kososki '70
Fred Schultz '69
Tom Boyd '68
Tom Terry '67

◆ Meeting Dates ◆

Regular Meetings
Held at the Coach & Four
Route 33, Hightstown, NJ
12:00 noon

- ◆ January 21, 1997
- ◆ April 15, 1997
- ◆ July 15, 1997
- ◆ August 21, 1997
Golf Outing
- ◆ October 21, 1997
- ◆ December 1997 TBA

OFFICERS

(609) 232-6126

PRESIDENT - Peter Elliott,
Marketing Rep, Andover Companies
(609) 935-1851

VICE PRES - Kevin Mitchell,
Marketing Rep, Farmers of Salem
(908) 607-2963

TREASURER - Cynthia Tortorici,
Marketing Rep, Maryland Ins. Co.
(908) 832-5574

SECRETARY - Ralph Petrella,
Marketing Rep, Providence Mutual

NEW ENGLAND 1752 CLUB
137 PENNSYLVANIA AVE.
FRAMINGHAM, MA 01701

February 22, 1998

Martin F. Quinn
Membership Chairman
New Jersey 1752 Club
P. O. Box 408
Pompton Plains, NJ 07444-1014

Dear Martin ,

I'm sorry it's taken so long to reply to your letter of January 7, 1998. I am not only the Treasurer of the Club but also the membership chairman, so your letter found it's way to me from our official mailing address which is the PIA office for Massachusetts. For future correspondence, you can use my home address of 162 Skunknet Road, Centerville, MA 02632.

I am enclosing a copy of our membership application for your perusal. We meet the first Friday of every month during our business season which starts in September and ends in May with not only our monthly meeting but usually a golf outing by the second or third week of that month. We have a Board of Directors Meeting in lieu of the standard meeting in January and July although all members are welcomed for participation and input. We try to have guest speakers at all our general membership meetings and usually they have some connection in the industry, which we can all relate to.

We don't have a brochure as you do and do our membership recruiting primarily by referral; although I'm told we can get a similar brochure by PIA who helps us out for mailing and duplicate record keeping. We are fortunate to have the services of the PIA personnel (one in particular) who assists the club with printing the letters and getting them sent on a timely basis.

I assume you rotate your officers on a yearly basis and we do as well with the exception of my position as Treasurer. My predecessor was Treasurer for several years (teens, I believe) and I've held the position for about five years now. I'm not sure I'll last for the duration of my insurance career but will continue as long as feasible. We currently have about 130 active members and about 20 retirees and that number varies slightly with marketplace conditions and changes.

Anyways, that's a snapshot of the operation and to finally answer your original question, we wouldn't have a problem with meeting or getting together at some time. Any of the individuals on the enclosed list can be contacted either through me or PIA in Framingham. Did you have any specific ideas or suggestions? Looking forward to hearing from you.

Very truly yours,

Stephen J. Emma C.I.C.
Treasurer, N. E. 1752 Club

New Jersey 1752 Club



IMPORTANT MEETING NOTICE

Please note that the next meeting of the 1752 Club has been changed to Tuesday, January 27th. As always, our meeting will be held at 12 Noon at the Coach and Four Restaurant in Hightstown, NJ. This will be the club's organizational meeting for the new year. The officers to be installed are as follows:

Kevin Mitchell – President
Cynthia Tortorici – Vice President
Ralph Petrella – Treasurer
William Kelly – Secretary

At the January meeting, we hope to have a speaker from either the I.I.A.N.J. or the P.I.A.

Enclosed you will find the annual membership form. Please complete the form and return it along with the \$15. annual dues. Also enclosed is the club's C.I.C. Scholarship donation form. If you or your company would like to contribute this year, please complete the form and return it with your donation.

See you on January 27th.

Sincerely,

Ralph Petrella
Secretary

New Jersey 1752 Club



January 7, 1998

New England 1752 Club
137 Pennsylvania Avenue
Framingham, MA 01701

Greetings from the New Jersey 1752 Club.

Your Christmas flyer was given to me recently and on behalf of the Club I would like to ask if it would be possible for us to get together some time in the future. I'm sure there would be a lot to discuss since we have so much in common.

Our brochure for the past year as well as our membership application are enclosed. It will give you some idea of our activity.

We hope this is a beginning.

Very truly yours,

A handwritten signature in cursive script, which appears to read "Martin F. Quinn".

Martin F. Quinn
Membership Chairman



General Accident

*Left msg
for Dawn Horis
to chg address
2/26/98*

10 Charles Street
PO Box 6648
Providence RI 02940-6648
401-521-1900

February 23, 1998

Robert A. Motta, Sec., N.E. 1752 Club
c/o Arbella Protection Ins. Co.
500 Crown Colony Drive
Quincy, MA 02169

Subject:
Address Change

Dear Bob:

I've made several attempts to change my mailing address since last July, without success. I'm hoping you can help. My old address was:

8 Edward Ave.
PO Box 1181
Slatersville, RI 02876

My new address is:

136 Fenner Ave.
Riverside, RI 02915

Please process the new address change as soon as possible.

Thank you in advance for your assistance, Bob.

Sincerely,

Brad Connell



KEN'S STEAK HOUSE

WORCESTER TURNPIKE (ROUTE 9) • FRAMINGHAM, MASSACHUSETTS 01701
TELEPHONE 235-5414 - 875-4455



August 14, 1997

Ms. Joanna Walsh
192 Prospect St.
Auburn, MA 01501

Dear Ms. Walsh,

The 1752 Club meeting dates for 1997 are confirmed for September 5, October 3, November 7, and December 5. The meeting dates for 1998 are confirmed for January 9, February 6, March 6, April 3 and May 1.

Please call if you have any questions or require additional services.

Sincerely,

Richard Fruitkin
Function Manager



New England 1752 Club

137 Pennsylvania Avenue • Framingham, MA 01701

July 28, 1997

Stephen J. Kenneally, CPCU
Swiss Reinsurance America Corporation
60 State Street
Boston, Massachusetts 02109

Dear Stephen,

The Executive Committee of the New England 1752 Club met on July 18th, 1997 to discuss your membership application.

Your membership eligibility came into question, as your employer is not a Fire or Casualty Insurance Company.

In the past, we have had several individuals, who are field reps, seek membership in the Club, but were declined as the by-law clearly states:

“Active Membership shall consist of only full-time, salaried Field Representatives of Fire or Casualty Insurance Companies operating on an agency basis in any or all of the New England States....”

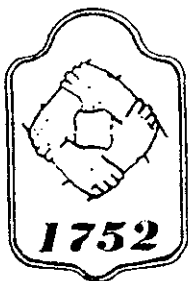
In fairness to others, we regrettably cannot accept your application for membership and therefore, we are returning your check in the amount of \$30.00.

Sincerely,

Joanna E. Walsh, AAM
President, New England 1752

JEW/fr

cc: R. Motta, Secretary
S. Emma, Treasurer
file



New England 1752 Club

137 Pennsylvania Avenue ♦ Framingham, MA 01701

July 24, 1997

Leslyn D. Johnson
P.O. Box 187
East Killingly, CT 06243

Dear Leslyn,

Hope your summer is going well, both professionally and personally.

We missed you at our July 18th Board of Directors Meeting. On our Agenda was the selection of Committee Chairs for 1997-1998.

You have done a marvelous job for 1752 as an Audit Committee Member and I'd personally, on behalf of all our members, like to thank you.

At Firday's meeting, it was suggested that we ask two new members to take over for the coming year. Those members that volunteered for this committee were Howie Adams and Barbara Miller.

Yes, you are off the hook at least for the time being. The problem with doing a Great Job is you get more jobs to do. I'm sure you will be called upon for another committee in the future. How about volunteering for the Boston Convention if we vote to participate this year. Give it a thought.

Looking forward to seeing you at our September meeting.

Sincerely,

Joanna E. Walsh, AAM
President, 1752

fr



New England 1752 Club

137 Pennsylvania Avenue • Framingham, MA 01701

July 24, 1997

Karen A. Sponburgh
2205 Boston Road
Wilbraham, MA 01095-1164

Dear Karen,

Hope your summer is going well, both professionally and personally.

We missed you at our July 18th Board of Directors Meeting. On our Agenda was the selection of Committee Chairs for 1997-1998.

You have done a marvelous job for 1752 as an Audit Committee Member and I'd personally, on behalf of all our members, like to thank you.

At Firday's meeting, it was suggested that we ask two new members to take over for the coming year. Those members that volunteered for this committee were Howie Adams and Barbara Miller.

Yes, you are off the hook at least for the time being. The problem with doing a Great Job is you get more jobs to do. I'm sure you will be called upon for another committee in the future. How about volunteering for the Boston Convention if we vote to participate this year. Give it a thought.

Looking forward to seeing you at our September meeting.

Sincerely,

Joanna E. Walsh, AAM
President, 1752

fr

DATE: September 2, 1997
TO: Dawn Harris - Agents Association
FROM: Bob Motta - New England 1752 Club
CC:
RE: Mailing for the October 3, 1997 Meeting

Good Day Dawn, how have you been?
The speaker for the October meeting is :

Thomas H. McBrien

of

McBrien Associates

Topic : Producers strategies for successfully selling P&C Insurance

Please prepare the mailing when its convenient, Thanks!!

Peerless Insurance

Nationale-Nederlanden U.S. Group



OK

Regional Office
62 Maple Avenue
Keene, New Hampshire 03431
1-603-352-3221

September 17, 1987

Mr. Edward B. Caulkins, Jr.
1 Peter Road
Salem, MA 01970

Re: Retirement

Dear Ed:

I have elected to take early retirement effective January 1, 1988.

Having been a member of the 1752 Club since 1956, you can appreciate that I want to extend my sincere best wishes for its continued success, and the realization of its purpose, aims and reason for being.

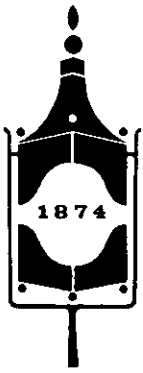
My best personal regards to you and all of the members.

Sincerely,

A handwritten signature in cursive script that reads "Ken".

Ken Gilbert
Regional Marketing Manager
Northern New England Regional Office

KG:pam



Union Mutual Fire Insurance Company
New England Guaranty Insurance Company, Incorporated

139 State Street, P. O. Box 158, Montpelier, Vermont 05602-0158

Telephone: Area Code 802 223-5261

**UNION MUTUAL
OF VERMONT**

August 28, 1987

Patricia A. Noone
New England 1752 Club
Number One Ash Street
Hopkinton, Massachusetts 01748

Dear Ms. Noone

We have a new employee whom we would like to have become a member of the New England 1752 Club (Earl R. MacInnes). Please send a membership form to my attention so that he can be signed up.

Thank you for your help.

Sincerely

A handwritten signature in cursive script, appearing to read "John F. McLaughlin".

John F. McLaughlin
Vice President

/pl

BYSE

"YOUR FRIEND IN THE
LAKES REGION"

AGENCY, INC. / INSURANCE

208 UNION AVENUE • P.O. BOX 1346 • LACONIA, NEW HAMPSHIRE 03247 • (603) 524-4242



July 14, 1987

Patricia Noone
31 Bishop Drive
Framingham, MA 01701

Dear Patricia:

Per our conversation, enclosed please find a copy of the check sent by BYSE AGENCY, INC. to cover the September CIC on my behalf. Please reimburse the BYSE AGENCY, INC. with the scholarship money. Unfortunately, bookkeeping did not keep a copy of the registration form in the files. If this is a problem please let me know and I will try to get a copy from PIA.

With regards to the luncheon that we did discuss, there is no problem with my attending in September. Please let me know the details as we get closer to the actual date.

I wish to thank you and your organization for honoring me with this award. I will use this to benefit my industry to the best of my ability. Thank you.

Sincerely,

BYSE AGENCY, INC.

A handwritten signature in cursive script that reads "Janet Gaudette-Cimon".

Janet Gaudette-Cimon, C.P.I.W.
Senior Client Service Representative

enc. 1

THE NORFOLK & DEDHAM GROUP

January 3, 1989

Mr. Robert Skinner, President
New England 1752 Club
116 Tember Lane
Holden, MA

Dear Bob

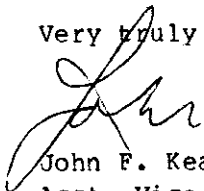
I have completed an audit of the club's book for the period of May 1, 1985 through November 1, 1988. The files were given to me on December 2, 1988 by Edward Caulkins. After a thorough review of these files, everything appears to be in order. I reviewed each month's accounting and compared this with the bank's monthly statements, and for the most part, they balanced. The deposits are made on a timely basis. The methodology used by the treasurer was easy to follow. All receipts and paid out expenses were well documented.

Recommendations:

1. All check memos be completed.
2. All checks given out in advance (from end of checkbook) should be recorded in the check register by the exact check number when the amount is known.
3. The president should determine who is not staying for lunch at the end of the general meeting and arrange to have these monies collected at that time.
4. The president should make an announcement when lunch commences and the monies for lunch should be collected at that time.
5. A sub-committee of the Board-of-Directors should be appointed by the president, "The Audit Committee", and an annual audit be conducted at the conclusion of the business year, but prior to the summer board meeting.

I have returned all files to Mr. Caulkins by UPS on January 4, 1989. I feel Mr. Caulkins is doing an excellent job for the club and should be commended publicly at the next general meeting.

Very truly yours,



John F. Keaveney, CPCU, CIC
Asst. Vice President

JFK:cmj

NORFOLK & DEDHAM MUTUAL FIRE INSURANCE Co.
WEST NEWBURY MUTUAL FIRE INSURANCE Co.



222 Ames Street, Dedham, Massachusetts 02026
Phone (617) 326-4010 FAX (617) 329-1818

HINGHAM MUTUAL FIRE INSURANCE COMPANY

49 MAIN STREET · HINGHAM, MASSACHUSETTS 02043 · TEL. (617) 749-0841

INCORPORATED 1826

TO: 1752 Club Members
DATE: September 15, 1982
SUBJECT: October Meeting - October 1, 1982, 9:30 A.M.
The Maridor, Route 9
Framingham, Massachusetts

Dear Member:

Our next meeting will be held October 1, 1982.

The following is a list of important dates, namely, our meeting schedule for the upcoming year:

November 12, 1982
December 10, 1982
January 7, 1983 (Board of Directors Meeting)
February 4, 1983
March 4, 1983
April 8, 1983
May 6, 1983

Please mark your calender accordingly.

Looking forward to seeing you at this meeting.

Very truly yours,

Bruce M. Arnold

Bruce M. Arnold

BMA:dd



NEW ENGLAND 1752 CLUB

NUMBER ONE ASH STREET • HOPKINTON, MASSACHUSETTS 01748

PAST DUES NOTICE

DATE: ~~AUGUST 10, 1981~~ JAN. 14, 1982

TO: ALL 1752 CLUB MEMBERS

RE: MEMBERSHIP DUES - PAST DUE

DUES ARE NOW ^{PAST} DUE AND PAYABLE. PLEASE FORWARD YOUR DUES PAYMENT FOR 1981 - 1982 DUES IN THE AMOUNT OF \$15.00 TO TREASURER EDWARD B. CAULKINS, JR.

54 MAVERICK STREET
MARBLEHEAD, MA 01945

THANK YOU!!!

EDWARD CAULKINS, TREASURER

EBC/BJP

Ted -
I have joined the Western Massachusetts Insurance Association which include persons self insured in Marketing, Underwriting and Claims. It meets in Springfield which is more convenient for me. Please remove my name from Active membership in the 1752 Club.

Regards
Bern Thomas
Reveries Insurance Co.

2/7/82



FOUNDED 1836

MIDDLESEX MUTUAL ASSURANCE COMPANY

MIDDLETOWN, CONNECTICUT 06457
TELEPHONE 203 347-4621

December 22, 1981

Mr. Donald Keef
National Grange Mutual Insurance Company
338 B. Great Road, Apt. 24
Acton, Mass 01720

Re: 1752 Club

Dear Don:

Congratulations to you on being accepted as a member into the 1752 Club. You are now considered an active member in this organization, and the first meeting of the new year will be held February 15, 1982, at the Maridor Restaurant, Route 9, Framingham, Mass. The meeting will begin with coffee at 9:30 a.m.

I look forward to meeting you on that date.

Yours truly,

Bill Dillon
William T. Dillon
Secretary

WTD:br



FOUNDED 1836

MIDDLESEX MUTUAL ASSURANCE COMPANY

MIDDLETOWN, CONNECTICUT 06457
TELEPHONE 203 347-4621

December 28, 1981

Re:
1752 Board of Directors
Meeting

Gentlemen:

A Board of Directors meeting has been scheduled for January 8th at 9:30 a.m. in the Peddlar Room of The Yankee Drummer Inn, Auburn, Mass.

Bill Dillon
Secretary

WFD:br



FOUNDED 1836

MIDDLESEX MUTUAL ASSURANCE COMPANY

MIDDLETOWN, CONNECTICUT 06457
TELEPHONE 203 347-4621

June 29, 1981

Re: 1752 Board of Directors Meeting

Gentlemen:

A Board of Directors meeting has been scheduled for July 10, 1981, at The Yankee Drummer Inn, Auburn, Mass. The time is 10:00 a.m.

Bill Dillon
Secretary

WTD:br

Sick Adams.
49 Meadowbrook Rd.
Southborough Conn. 06107

Jeff Larson
5 Parkview Rd
Melford Ma 01707

Ed Cullbins
54 Maverick St
Marblehead Mass 01945

Gene Smith
47 Ashburn St
Chelsea Mass 02151

William Gleason
P.O. Box 2186
So Portland Me. 04106

Earl Phillips
Talpona Municipal
Apex Inc
Lindabury Conn 06033

Keri Galt
150 Park Rd.
Laurin Mass 02154

Lucy Linn
55 Madewood Lane
Old Saybrook, Conn. 06475

John W. Wain
20 Park Rd.
Spring Mill, N.H. 03083

Bruce Conroy
24 Pepper Lane
Dunstable, Mass. 01935

John W. Wain
20 Park Rd.
Spring Mill, N.H. 03083

John W. Wain
Employee Mutual Companies
135 Riverside Drive
Springfield, N. H. 02874

John W. Wain
Employee Mutual Fire Ins Co
135 Riverside Drive
Springfield, Mass. 01104