

Directions for completing Leverett Assessor's Fiscal Year report: Return of Property Held for Charitable Purposes (State Tax Form 3ABC, revised 11/2010)

Form is due either March 1 or May 1 (March is crossed out, but is probably the correct one). It is sent to RGT PO Box 195

B. Identification:

See scan.

Contact person is treasurer

Summary adapted from ByLaws, Article II Purposes, Section 3 Goals.

fill in all this every year

C. Financial Statement (This comes from previous' years state tax report, which includes Federal tax form) Again, both of these are the one's submitted the previous April.

See scan (take from state/fed report):

Total Income:

Unrelated Business Income Received:

Other Income Received:

Total Income Received:

Total Assets:

Real Estate:

Tangible Personal Property:

Other:

Total Assets:

D. Real Estate:

See attached list. This will needed to be added to if RGT acquires new (owned) property - Conservation Restrictions are **not** included (we don't own them).

If any new property is acquired, add it to the list and include a copy of the deed - available at the Franklin Lands Records Office. You can get on-line or there should also be a copy on file on the Board section of the website under the name of that property (in baseline documentation).

E. Registered Motor Vehicles - Not Applicable

F. Public Charities Report

Attach BOTH the state and the federal form (not clear in print, but following Steve's request)

Since this form is due in March, could never be the previous year's form, hence do the one for the year before that. (If this is unclear, see example below.)

G. Signature - must be an officer

NOTE:

A paper and electronic copy of each year's submission (from now on) MUST be kept by the Treasurer. A second copy should be on a different computer. The second person this year is Julie Shively. If that changes - a note should be made here. The Board also asked that this packet be put in the Board section of the website. And that each year the new report be added to that site.

MAW, 6/7/2013

Please see

Annual Report to Assessor's Office 2014

scan of 2-page report

Appendix: RGT Property List

Appendix: copy of state attorney general's report for 2012 (12 pages, one page in this version, rest in separate tiff file)

Appendix: 990 Report for 2012 (1 page)