

Charity Portal

- [Close Window](#)
- [Print This Page](#)
- [Expand All](#) | [Collapse All](#)

FPC-681557

Charity

AGO Charity Record	Rec-40814	AG Charity Number	044401
Charity Name	MASS SOLDIERS LEGACY FUND		
Test field to Trigger the Payment Email			

eFiler Info

eFiler Email	nfptax@kahnlitwin.com	Preparer Name	Patrick Martin
Filing Year	2023	Filing Status	Awaiting Signature
Filing Mode	eFile		

Organization Details

Form-PC Name	FPC-681557	Date of determination letter	2/24/2005
Federal Id	20-1909556	Current Fiscal Period End Date	12/31/2023
Current Fiscal Period Start Date	1/1/2023	Fax Number	
eFiler Compay Name (if diff frm Charity)	KLR	Form of Organization	Other
Is eFiler different from org contact?	Yes	IRS Tax Exempt Status	Received
eFiler Name (diff frm Charity)	SANDY ROSS, CPA	Is address same as org address?	<input checked="" type="checkbox"/>
eFiler Street Address (diff frm Charity)	951 North Main Street	Is Final Prior to Dissolution?	<input type="checkbox"/>
eFiler City	Providence	Mailing Address	225 CEDAR HILL STREET, 200
eFiler State (diff frm Charity)	Rhode Island	Organization Created Date	11/22/2004
eFiler Zip Code (diff frm Charity)	02904	Organization Created Place	MASSACHUSETTS
eFiler Phone Number (diff frm Charity)	401-274-2001	Organization First Charity Engage Date	11/22/2004
Organization Name	MASS SOLDIERS LEGACY FUND	Other form of Organization	TRUST
Organization Purpose 1	Provide grants	Primary Contact Name	ERICA ZEIGER
Organization Purpose 2		Contact Person Email	erica@mslfund.org
Organization Address	225 CEDAR HILL STREET, 200	Primary Contact Street Address	225 CEDAR HILL STREET, 200
Organization City	MARLBOROUGH	Primary Contact City	MARLBOROUGH
Organization State	Massachusetts	Primary Contact State	Massachusetts
Organization Zip Code	01752	Primary Contact Zip Code	01752

Type of Organization	Philanthropy/ Voluntarism/ Grantmaking Foundations	Primary Contact Phone	508-630-2382
Under what section 501(c)	3		

Types of Solicitation activities expect to engage (Fiscal year reported here)

Sch.A1 Mass mailing	<input checked="" type="checkbox"/>	Sch.A1 door-to-door	<input type="checkbox"/>
Sch.A1 Entertainment event	<input checked="" type="checkbox"/>	Sch.A1 Telemarketing w/out sale of goods	<input type="checkbox"/>
Sch.A1 Telemarketing with sale of goods	<input type="checkbox"/>	Sch.A1 Telemarketing with sale of ads	<input type="checkbox"/>
Sch.A1 Via the Internet	<input checked="" type="checkbox"/>	Sch.A1 Raffle, bingo, or gaming event	<input type="checkbox"/>
Sch.A1 Sale of goods not by telephone	<input type="checkbox"/>	Sch.A1 Individual mailings	<input checked="" type="checkbox"/>
Sch.A1 Corporate solicitations	<input checked="" type="checkbox"/>	Sch.A1 Grant proposals	<input checked="" type="checkbox"/>
Sch.A1 Other types of solicitation			

Types of Solicitation activities expect to engage (Fiscal year following)

Sch.A2 Mass mailing	<input checked="" type="checkbox"/>	Sch.A2 door-to-door	<input type="checkbox"/>
Sch.A2 Entertainment event	<input checked="" type="checkbox"/>	Sch.A2 Telemarketing w/out sale of goods	<input type="checkbox"/>
Sch.A2 Telemarketing with sale of goods	<input type="checkbox"/>	Sch.A2 Telemarketing with sale of ads	<input type="checkbox"/>
Sch.A2 Via the Internet	<input checked="" type="checkbox"/>	Sch.A2 Raffle, bingo, or gaming event	<input type="checkbox"/>
Sch.A2 Sale of goods not by telephone	<input type="checkbox"/>	Sch.A2 Individual mailings	<input checked="" type="checkbox"/>
Sch.A2 Corporate solicitations	<input checked="" type="checkbox"/>	Sch.A2 Grant proposals	<input checked="" type="checkbox"/>
Sch.A2 Other types of solicitation			

Solicitation

Solicit contributions FY reported?	Yes	Sch.A1 Claim exemption?	No
Sch.A1 religious exemption	<input type="checkbox"/>	Sch.A1 Under 5k, 10 people exemption	<input type="checkbox"/>
AKA during Solicitation of Charity	N/A		
Sch.A1 Professional solicitor	No	Sch.A1 Professional solicitor name	
Sch.A1 Professional solicitor address		Sch.A1 Professional solicitor city	
Sch.A1 Professional solicitor state		Sch.A1 Professional solicitor zip code	
Sch.A1 Professional fundraising counsel	No	Sch.A1 Prof fundraising counsel name	
Sch.A1 Prof fundraising counsel address		Sch.A1 Prof fundraising counsel city	

Sch.A1 Prof fundraising counsel state		Sch.A1 Prof fundraising counsel zip code	
Sch.A1 Commercial co-venturer	No	Sch.A1 Commercial co-venturer Name	
Sch.A1 Commercial co-venturer address		Sch.A1 Commercial co-venturer city	
Sch.A1 Commercial co-venturer state		Sch.A1 Commercial co-venturer zip code	
Sch.A1 Own employees	<input checked="" type="checkbox"/>	Sch.A1 Volunteers	<input checked="" type="checkbox"/>
Sch.A1 Custody Indiv Responsible Name 1	PETER G. TROVATO (TRUSTEE)	Sch. A1 Custody Indiv Responsible Add 1	225 CEDAR HILL ST
Sch.A1 Custody Indiv Responsible City 1	MARLBOROUGH	Sch.A1 Custody Indiv Responsible State 1	Massachusetts
Sch.A1 Custody Indiv Responsible Zip 1	01752		
Sch.A1 Custody Indiv Responsible Name 2	TIMOTHY PINCH (TRUSTEE)	Sch. A1 Custody Indiv Responsible Add 2	225 CEDAR HILL ST
Sch.A1 Custody Indiv Responsible City 2	MARLBOROUGH	Sch.A1 Custody Indiv Responsible State 2	Massachusetts
Sch.A1 Custody Indiv Responsible Zip 2	01752		
Sch.A1 Custody Indiv Responsible Name 3		Sch. A1 Custody Indiv Responsible Add 3	
Sch.A1 Custody Indiv Responsible City 3		Sch.A1 Custody Indiv Responsible State 3	
Sch.A1 Custody Indiv Responsible Zip 3			
Sch.A1 Distrib Indiv Responsible Name 1	ROBERT T. HALE JR	Sch.A1 Distrib Indiv Responsible Add 1	225 CEDAR HILL ST
Sch. A1 Distrub Indiv Responsible City 1	MARLBOROUGH	Sch.A1 Distrib Indiv Responsible State 1	Massachusetts
Sch. A1 Distrib Indiv Responsible Zip 1	01752		
Sch.A1 Distrib Indiv Responsible Name 2	GLENN MANGURAIAN (TRUSTEE)	Sch.A1 Distrib Indiv Responsible Add 2	225 CEDAR HILL ST
Sch. A1 Distrub Indiv Responsible City 2	MARLBOROUGH	Sch.A1 Distrib Indiv Responsible State 2	Massachusetts
Sch. A1 Distrib Indiv Responsible Zip 2	01752		
Sch.A1 Distrib Indiv Responsible Name 3	ERIC KAPITULIK (TRUSTEE)	Sch.A1 Distrib Indiv Responsible Add 3	225 CEDAR HILL ST
Sch. A1 Distrub Indiv Responsible City 3	MARLBOROUGH	Sch.A1 Distrib Indiv Responsible State 3	Massachusetts
Sch. A1 Distrib Indiv Responsible Zip 3	01752		
Solicit contributions following FY?	Yes	Sch.A2 Claim exemption?	No
Sch.A2 religious exemption	<input type="checkbox"/>	Sch.A2 Under 5k, 10 people exemption	<input type="checkbox"/>
AKA during Solicitation of Charity 2	N/A		
Sch.A2 Professional solicitor	No	Sch.A2 Professional solicitor name	
Sch.A2 Professional solicitor address		Sch.A2 Professional solicitor city	

Sch.A2 Professional solicitor state		Sch.A2 Professional solicitor zip code	
Sch.A2 Professional fundraising counsel	No	Sch.A2 Prof fundraising counsel name	
Sch.A2 Prof fundraising counsel address		Sch.A2 Prof fundraising counsel city	
Sch.A2 Prof fundraising counsel state		Sch.A2 Prof fundraising counsel zip code	
Sch.A2 Commercial co-venturer	No	Sch.A2 Commercial co-venturer name	
Sch.A2 Commercial co-venturer address		Sch.A2 Commercial co-venturer city	
Sch.A2 Commercial co-venturer state		Sch.A2 Commercial co-venturer zip code	
Sch.A2 Own employees	<input checked="" type="checkbox"/>	Sch.A2 Volunteers	<input checked="" type="checkbox"/>
Sch.A2 Custody Indiv Responsible Name 1	PETER G. TROVATO (TRUSTEE)	Sch.A2 Custody Indiv Responsible Add 1	225 CEDAR HILL ST
Sch.A2 Custody Indiv Responsible City 1	MARLBOROUGH	Sch.A2 Custody Indiv Responsible State 1	Massachusetts
Sch.A2 Custody Indiv Responsible Zip 1	01752		
Sch.A2 Custody Indiv Responsible Name 2	TIMOTHY PINCH (TRUSTEE)	Sch.A2 Custody Indiv Responsible Add 2	225 CEDAR HILL ST
Sch.A2 Custody Indiv Responsible City 2	MARLBOROUGH	Sch.A2 Custody Indiv Responsible State 2	Massachusetts
Sch.A2 Custody Indiv Responsible Zip 2	01752		
Sch.A2 Custody Indiv Responsible Name 3		Sch.A2 Custody Indiv Responsible Add 3	
Sch.A2 Custody Indiv Responsible City 3		Sch.A2 Custody Indiv Responsible State 3	
Sch.A2 Custody Indiv Responsible Zip 3			
Sch.A1 Distrib Indiv Responsible Name 4	ROBERT T. HALE JR (TRUSTEE)	Sch.A1 Distrib Indiv Responsible Add 4	225 CEDAR HILL ST
Sch.A2 Distrub Indiv Responsible City 1	MARLBOROUGH	Sch.A2 Distrib Indiv Responsible State 1	Massachusetts
Sch.A2 Distrib Indiv Responsible Zip 1	01752		
Sch.A1 Distrib Indiv Responsible Name 5	GLENN MANGURAIAN (TRUSTEE)	Sch.A1 Distrib Indiv Responsible Add 5	225 CEDAR HILL ST
Sch.A2 Distrub Indiv Responsible City 2	MARLBOROUGH	Sch.A2 Distrib Indiv Responsible State 2	Massachusetts
Sch.A2 Distrib Indiv Responsible Zip 2	01752		
Sch.A1 Distrib Indiv Responsible Name 6	ERIC KAPITULIK (TRUSTEE)	Sch.A1 Distrib Indiv Responsible Add 6	225 CEDAR HILL ST
Sch.A2 Distrub Indiv Responsible City 3	MARLBOROUGH	Sch.A2 Distrib Indiv Responsible State 3	Massachusetts
Sch.A2 Distrib Indiv Responsible Zip 3	01752		
Has this org solicitd funds out of state	No	Solicitation States	

Financial

Paid employees?	Yes	Compensation to individuals not included	No
Explanation for not quantified response		Compensation provided to consultants	Yes
Charity maintain a Bank Account?	Yes	No Charity Bank Reason	
Organization's accounting method	Accrual		
Contributions, gifts, grants received	\$30,322	Gross support and revenue	\$60,121
Program services and similar amounts	\$428,934	Fundraising expenses	\$14,538
Management and general expenses	\$48,465	Payments to affiliates	\$0
Total expenses	\$491,937	Net assets or fund balances	\$3,133,873

Restricted funds

Donor restrict funds loaned unrestrict	No	Restrict remove from fund - explain
Restrict remove from donor-restrict fund	No	Donor restrict funds loaned - explain

Management & Affiliates

Enjoined/prohibited from solic contrib?	No	Enj/prohib from solic contrib - explain
Been refused reg?	No	Been refused reg - Explanation
Voluntary agreement of compliance?	No	Voluntary agree of compliance - Explain
Subject of a proceeding?	No	Subject of a proceeding - explanation
Other offices/branches/chapters/affilia	No	

Reviewer's Data

Filer type for reviewer info		Reviewer name as a confirmation	
Single Employee Charity Request	<input type="checkbox"/>	Single Signatory Request Status	
Reviewer 1 Name	Erica Zeiger	Reviewer 2 Name	TIMOTHY FINCH
Reviewer 1 Email	erica@mselfund.org	Reviewer 2 Email	tpinch@gwwade.com
Reviewer1 Status	Accepted	Reviewer2 Status	
Preparer authorized signatory?	No		

Schedule VCO

Schedule VCO Q1	No	Schedule VCO Q2
Charitable purposes		Organization purpose

Related Parties

Payment/value transfer to related party	No
Payment Transf Addl info:	
Sold/bought asset to/from related party?	No
Asset Transacted Addl Info:	
Leased assets to/from related party?	No
Leased Assets Addl Info:	
Been indebted to related party?	No
Indebted Addl Info:	
Made/help investment in related party?	No
Investments Addl info	
Furnished goods, etc to related party?	No
Furnished Goods Addl Info:	
Acquired goods etc from RP-compensation?	No
Acquired Goods Addl Info:	
Agreement with related party	No
Agreement Addl Info:	
Paid wages to related party?	No
Paid Wages Addl Info:	
Transferred income to/for use by RP?	No
Transferred Income Addl Info:	
Org party to transaction w/fin interest?	No
Fin Interest Addl info:	
Org invested in corporate stock?	No
Corporate Stock Addl Info:	
Property held in name of person/org?	No
Property Held Addl Info:	
Org make grant award/contribution?	No
Contribution Addl info:	

Related party
explanation - value,
terms

Related party
explanation - name,
nature

Notes & Attachments

Federal Revenue Support

Type **File**
Last Modified **Sandy Ross**
Description
[Download](#)

Authorized Charity Individuals

Type **File**
Last Modified **Jonathan Green**
Description
[Download](#)

Principal Executives

Type **File**
Last Modified **Jonathan Green**
Description
[Download](#)

Financial Statement

Type **File**
Last Modified **Jonathan Green**
Description
[Download](#)

Highest Paid Employees

HPE-234721

Name/Title **ERICA ZEIGER**
Hrs/Week **40**
Benefit Plans **2985.00**
Other Compensation **0**
Salary and Other Income **\$99,500.00**
View More [Click Here](#)

HPE-234722

Name/Title
Hrs/Week
Benefit Plans
Other Compensation
Salary and Other Income
View More [Click Here](#)

HPE-234723

Name/Title
Hrs/Week
Benefit Plans
Other Compensation
Salary and Other Income
View More [Click Here](#)

HPE-234724

Name/Title
Hrs/Week
Benefit Plans
Other Compensation
Salary and Other Income
View More [Click Here](#)

HPE-234725

Name/Title
 Hrs/Week
 Benefit Plans
 Other Compensation
 Salary and Other Income
 View More [Click Here](#)

Highest Paid Consultants

HPC-093096

Name/Title **KAHN, LITWIN, RENZA & CO., LTD**
 Amount of \$\$ **\$21,000.00**
 Type(s) of Service **ACCOUNTING**
 View More [Click Here](#)

HPC-093097

Name/Title **Regus Management Group, LLC**
 Amount of \$\$ **\$13,738.41**
 Type(s) of Service **RENTAL MANAGEMENT**
 View More [Click Here](#)

HPC-093098

Name/Title **JACKRABBIT DESIGN**
 Amount of \$\$ **\$2,650.00**
 Type(s) of Service **MARKETING**
 View More [Click Here](#)

HPC-093099

Name/Title **Supporting Strategies LLC**
 Amount of \$\$ **\$6,576.00**
 Type(s) of Service **BOOKKEEPING**
 View More [Click Here](#)

HPC-093100

Name/Title **Smartfish**
 Amount of \$\$ **\$3,251.42**
 Type(s) of Service **MARKETING**
 View More [Click Here](#)

Bank Details

BANK-094079

Address **100 N. TYRON ST., CHARLOTTE, NC 28255**
 Bank **BANK OF AMERICA**
 Phone Number **800-432-1000**
 View More [Click Here](#)

BANK-094080

Address
 Bank
 Phone Number
 View More [Click Here](#)

BANK-094081

Address
 Bank

Phone Number

View More [**Click Here**](#)