



Cypress Tree Management Natick

# Select Board Meeting

February 10, 2021





- ❑ Cypress Tree Management Natick (“CTM”) is founded and led by local childhood friends Victor Chiang, Todd Finard and Eric Liebman
- ❑ Our group is locally owned – we have no relationship with any national cannabis company or any other MA cannabis license holder
- ❑ We have a long history of running local businesses



## Founders



**Victor Chiang (Co-Founder)** spent 12 years as at Andersen Consulting/Accenture where he was focused on management and IT consulting in the Financial Services practice. He then spent 11 years as a co-founder of Balter Capital Management, a hedge fund boutique that has several hedge fund and mutual fund products, and a hedge fund advisory service, with peak assets of \$1.4B. Victor is a board member of the MA Cannabis Business Association. Outside of work, Victor volunteers with the Dana-Farber where he co-chairs an annual golf tournament. Victor grew up in Weston, MA and currently lives in Wellesley with his family.



**Todd Finard (Co-Founder)** is Chief Executive Officer of Finard Properties. In the 25 years that Todd has been a real estate developer, he has become an active leader in the communities in which he operates. He is a founder of the Combined Jewish Philanthropies Next Generation Housing Corporation, a housing platform for adults with disabilities in the Boston area. He is the immediate past Chairman of the Board of Hebrew SeniorLife – the largest geriatric care provider in New England. Currently, Todd serves as the Chairman of the Board of Advisors for the School at the Museum of Fine Arts at Tufts University, his alma mater. Todd grew up in, and continues to reside in Weston with his family.



**Eric Liebman (Co-Founder)** has spent over 20 years working in real estate both in the Boston area and New York. Eric spent 8 years working in manufacturing and retail for a family run business with offices in Boston, Hong Kong and China, where their customers were major big-box retailers. Prior to that, Eric was involved in the initial launch of the Boloco restaurant group as an equity holder and instrumental in open the first store in Fenway (steps from our proposed retail site). Eric is a lifetime member and supporter of the West End House Boys and Girls Club of Allston and has recently returned from Cambodia, having volunteered at the Children's Center in Phnom Pehn. Eric grew-up in Brookline and currently resides in Somerville with his family.

## CTM Executives



**Lisa Burke (Director of Retail)** has been a part of the regulated cannabis market in Massachusetts since its legalization in 2015. She was one of the retail managers at New England Treatment Access' adult-use and medical dispensary in Brookline, MA, overseeing over 190 staff. She has been a part of NETA's retail organization since its inception and was an integral part of its growth as the premier operator in the MA cannabis market. The Brookline dispensary is by far the largest revenue generating dispensary in MA. In her role she helped develop and implement all aspects of their retail operations, which currently services between 2,500-3,200 customers per day. She brings a deep cannabis knowledge and experience in educating and servicing both experienced and new cannabis users. Lisa resides in Somerville with her family.



**Paris Caldwell (Director of Operations)** has been a part of the regulated cannabis market in Massachusetts since graduating from the University of Massachusetts, Boston, having joined New England Treat Access' adult-use and medical dispensary in Brookline, MA, where she was quickly promoted to Operations Manager. Her primary focus was on store operations, collaboration between NETA's two stores, hiring, payroll management, active community outreach and sales expansion. Born and raised in Newton, MA in a family of teachers and doctors, she has been instilled with the value of improving others' quality of life and brings this core value to the cannabis retail operations. Paris lives currently lives in Allston.



**Chris Orfao (IT Manager)** joined the legal cannabis five years ago and has held numerous positions from retail, production, cultivation and IT. This board experience gives him a more holistic view of the industry that helps guide his technology decisions when it comes to software selection and building functionality to truly meet how the retail staff actually operates. Chris also has extensive experience in inventory management and maintaining inventory records in the State's tracking system METRC. Chris lives in Fitchburg with his girlfriend, one-year daughter and Australian cattle dog mix Cooper.



**Rick Nagle (Director of Security)** worked in Massachusetts law enforcement for over 30 years. He spent 10 years as an investigator for both the Norfolk County and Plymouth County District Attorneys' offices, before being assigned to the Commonwealth's Cold Case Unit. He then became a supervisor in the State Police's Crisis Management office, and then was promoted to Narcotics Inspector with the Massachusetts State Police. His duties included being responsible for all narcotic evidence seized by the Massachusetts State Police. Rick was also in charge of reviewing and developing security policies and procedures for the State Police. At Cypress Tree, Rick will be developing policies and procedures relative to interior and exterior security of the CTM facilities. Rick will also be actively involved in hiring and training all security personnel.







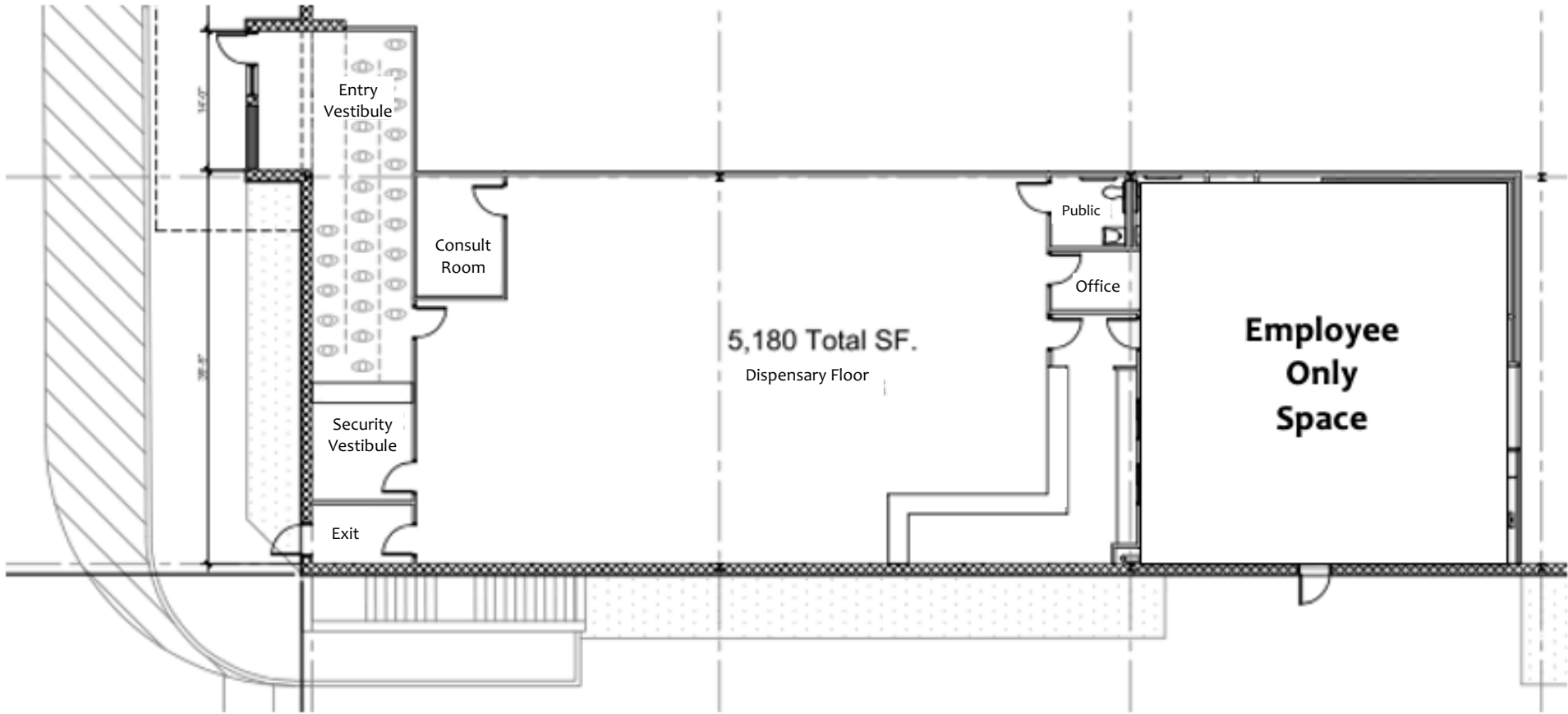


- ❑ Open our retail store concept, branded Redi





# Our Proposal



**Our retail experience is centered around educating our customers on the product, dosing, safe consumption and storage, in an inviting and safe environment**

## ❑ Education

- ❖ In-store consultations
- ❖ Zoom or virtual consultations
- ❖ Guest speakers from wellness, health, cannabis and medical community

## ❑ Curate product selection for the desired experience

- ❖ Focus on effect specific product selection
- ❖ Shift away from potency selection
- ❖ Proper dosing

## ❑ Security

- ❖ State of the art security including cameras, access controlled doorways, panic buttons and onsite security personnel
- ❖ ID scanner technology to verify only customers 21 and older enter the store
- ❖ Security personnel will conduct random patrols of the exterior area of the store

- ❑ We have a proven track record of being a good corporate citizen in Natick and will build upon this
  - ❖ Rt. 9/27 Plaza Redevelopment and MassDOT intersection improvement
  - ❖ Natick Mall / Flutie Pass
- ❑ Hire Natick residents
- ❑ Find opportunities to help other local small business and community charities
- ❑ Accountability and access to ownership and senior executives for Natick community members