

Lunenburg Trust Fund Commission

Sudolnik Conference Room

Lunenburg Public Library

July 24, 2026

Commissioners present were Mr. Richard Howard and Chairman John Bowen. The meeting was called to order at 5:03 pm by Chairman Bowen. Members recited the Pledge of Allegiance.

Chairman Bowen proceeded to read the posted Agenda and open meeting law provisions.

There was no Public comment either in person nor over the Zoom platform.

With the recent appointment by the Selectboard of Mr. Howard to the vacancy on the Trust Fund Commission, Chairman Bowen made a motion to elect Mr. Howard as the Vice-Chairman of the Lunenburg Board of Trust Fund Commissioners. Mr. Howard seconded the motion. The result of the vote was Chairman Bowen = aye, Mr. Howard = aye.

Chairman Bowen introduced a special guest, Mr. Ernie Sund, who was one of the original devisees for the American Legion 283 Fund. Mr. Sund of 13 Menorca Way Palm Coast FL lived in Lunenburg for 35-40 years and served in both the military and as a Lunenburg Selectman.

Mr. Sund provided the Trust Fund Commission with a detailed history of the Post 283 fund and what the founding members intended to achieve and realize from the fund. At some point the membership realized they did not have membership to sustain a Post in Lunenburg, but wanted the funds to remain in the Town and benefit the residents. The members of the Post created a Trust Fund with the treasurer and with the Trust Fund Commission empowered to dispense said funds.

The eligibility to receive a disbursement from the American Legion is determined by eligibility to join the American Legion, 3 years verified residency in Lunenburg, and only those that served during a period of conflict.

Eligibility (military discharge status) can be determined by the Lunenburg Veteran Service Officer and residency can be determined by the Town Clerk. There was a bit of discussion on the amount of funds that can be disbursed annually, which at the current account balance would be equal to 75% of the interest earned. Chairman Bowen also clarified that there are provisions when the account balance exceeds \$25,000 when different amounts can be disbursed. Mr. Howard asked a clarifying question on previously unexpended funds, and Mr. Sund clarified that previous year unspent funds do not carry forward.

Mr. Sund stated that the intent was to have funds also available to start a new Post in Town if people wanted. This specific item Mr Sund noted is currently not written into the declaration. Chairman Bowen advised Mr Sund that if he and other devisee wish to have that included, that should be done in coordination with the other founding members who signed the original declaration. Unfortunately, 2 of the 4 founding members of the Post have passed away.

Chairman Bowen prepared a briefing on Post 283.

We now have more clarity on the eligibility standard, which does not require membership in the American Legion, but applicants must meet the eligibility to join the American Legion.

Chairman Bowen, along with Town Counsel, feel that a cy pres filing is not necessary for the American Legion Post 283 fund.

Chairman Bowen read the attestation of the original declaration which Mr Sund signed.

Chairman Bowen presented the document as signed and requested Mr. Sund read and approve it as written. Chairman Bowen put forward a motion to accept Mr. Ernie Sund's signature on the attestation. The vote on the motion was Chairman Bowen=aye, Mr. Howard=aye, Mr. Ernie Sund=aye.

Due to scheduling conflicts, the next meeting of the Trust Fund Commission will be held on Thursday, August 27, 2026.

There was no public comment from attendees present in person nor on the Zoom platform. Chairman Bowen made some public comment on process improvements that should be implemented on the handling of appointees.

Chairman Bowen requested a motion to adjourn at 6:07pm. Motion seconded by Mr Howard, motion passed unanimously.

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