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FORM LM-2 LABOR ORGANIZATION ANNUAL REPORT

U.S. Department of Labor
Office of Labor-Management Standards
Washington, DC 20210

MUST BE USED BY LABOR ORGANIZATIONS WITH \$250,000 OR MORE IN TOTAL ANNUAL RECEIPTS AND LABOR ORGANIZATIONS IN TRUSTEESHIP

Form Approved
Office of Management and Budget
No. 1245-0003
Expires: 10-31-2013

This report is mandatory under P.L. 86-257, as amended. Failure to comply may result in criminal prosecution, fines, or civil penalties as provided by 29 U.S.C. 439 or 440.

READ THE INSTRUCTIONS CAREFULLY BEFORE PREPARING THIS REPORT.			
For Official Use Only	1. FILE NUMBER 024-254	2. PERIOD COVERED From 01/01/2011 Through 12/31/2011	3. (a) AMENDED - Is this an amended report: No (b) HARDSHIP - Filed under the hardship procedures: No (c) TERMINAL - This is a terminal report: No
4. AFFILIATION OR ORGANIZATION NAME ELECTRICAL WORKERS IBEW AFL-CIO		8. MAILING ADDRESS (Type or print in capital letters)	
5. DESIGNATION (Local, Lodge, etc.) LOCAL UNION		First Name DAVID	
6. DESIGNATION NBR 223		Last Name FENTON	
7. UNIT NAME (if any)		P.O Box - Building and Room Number PO BOX 1238	
		Number and Street	
9. Are your organization's records kept at its mailing address? Yes		City LAKEVILLE	
		State MA	
		ZIP Code + 4 023477238	

Each of the undersigned, duly authorized officers of the above labor organization, declares, under penalty of perjury and other applicable penalties of law, that all of the information submitted in this report (including information contained in any accompanying documents) has been examined by the signatory and is, to the best of the undersigned individual's knowledge and belief, true, correct and complete (See Section V on penalties in the instructions.)

26. SIGNED: Francis M Welch PRESIDENT 27. SIGNED: William A Warren TREASURER
Date: Mar 29, 2012 Contact Info: 508-947-8555 Date: Mar 29, 2012 Contact Info: 508-947-8555

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ITEMS 10 THROUGH 21

FILE NUMBER: 024-254

10. During the reporting period did the labor organization create or participate in the administration of a trust or a fund or organization, as defined in the instructions, which provides benefits for members or beneficiaries? **Yes**

11(a). During the reporting period did the labor organization have a political action committee (PAC) fund? **Yes**

11(b). During the reporting period did the labor organization have a subsidiary organization as defined in Section X of these Instructions? **No**

12. During the reporting period did the labor organization have an audit or review of its books and records by an outside accountant or by a parent body auditor/representative? **Yes**

13. During the reporting period did the labor organization discover any loss or shortage of funds or other assets? (Answer "Yes" even if there has been repayment or recovery.) **No**

14. What is the maximum amount recoverable under the labor organization's fidelity bond for a loss caused by any officer, employee or agent of the labor organization who handled union funds? **\$350,000**

15. During the reporting period did the labor organization acquire or dispose of any assets in a manner other than purchase or sale? **No**

16. Were any of the labor organization's assets pledged as security or encumbered in any way at the end of the reporting period? **No**

17. Did the labor organization have any contingent liabilities at the end of the reporting period? **No**

18. During the reporting period did the labor organization have any changes in its constitution or bylaws, other than rates of dues and fees, or in practices/procedures listed in the instructions? **No**

19. What is the date of the labor organization's next regular election of officers? **06/2014**

20. How many members did the labor organization have at the end of the reporting period? **445**

21. What are the labor organization's rates of dues and fees?

Rates of Dues and Fees				
Dues/Fees	Amount	Unit	Minimum	Maximum
(a) Regular Dues/Fees	28	per month	100.00	100.00
(b) Working Dues/Fees	4%	per wages	25.00	100.00
(c) Initiation Fees		per		
(d) Transfer Fees		per		
(e) Work Permits		per		

STATEMENT A - ASSETS AND LIABILITIES

FILE NUMBER: 024-254

ASSETS

ASSETS	Schedule Number	Start of Reporting Period (A)	End of Reporting Period (B)
22. Cash		\$1,551,423	\$1,405,612
23. Accounts Receivable	1		\$0
24. Loans Receivable	2	\$0	\$0
25. U.S. Treasury Securities		\$0	\$0
26. Investments	5	\$0	
27. Fixed Assets	6	\$614,760	\$593,219
28. Other Assets	7	\$10,389	\$10,389
29. TOTAL ASSETS		\$2,176,572	\$2,009,220

LIABILITIES

LIABILITIES	Schedule Number	Start of Reporting Period (A)	End of Reporting Period (B)
30. Accounts Payable	8		
31. Loans Payable	9	\$0	
32. Mortgages Payable		\$0	\$0
33. Other Liabilities	10	\$0	
34. TOTAL LIABILITIES		\$0	\$0

35. NET ASSETS		\$2,176,572	\$2,009,220
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STATEMENT B - RECEIPTS AND DISBURSEMENTS

FILE NUMBER: 024-254

CASH RECEIPTS		SCH	AMOUNT	CASH DISBURSEMENTS		SCH	AMOUNT
36. Dues and Agency Fees			\$700,256	50. Representational Activities	15		\$478,284
37. Per Capita Tax			\$155,393	51. Political Activities and Lobbying	16		\$10,279
38. Fees, Fines, Assessments, Work Permits			\$0	52. Contributions, Gifts, and Grants	17		\$1,940
39. Sale of Supplies			\$0	53. General Overhead	18		\$151,379
40. Interest			\$5,907	54. Union Administration	19		\$98,469
41. Dividends			\$0	55. Benefits	20		\$100,563
42. Rents			\$26,400	56. Per Capita Tax			\$156,846
43. Sale of Investments and Fixed Assets	3		\$6,500	57. Strike Benefits			\$0
44. Loans Obtained	9			58. Fees, Fines, Assessments, etc.			\$0
45. Repayments of Loans Made	2		\$0	59. Supplies for Resale			\$0
46. On Behalf of Affiliates for Transmittal to Them			\$0	60. Purchase of Investments and Fixed Assets	4		\$28,445
47. From Members for Disbursement on Their Behalf			\$0	61. Loans Made	2		\$0
48. Other Receipts	14		\$22,928	62. Repayment of Loans Obtained	9		
49. TOTAL RECEIPTS			\$917,384	63. To Affiliates of Funds Collected on Their Behalf			\$0
				64. On Behalf of Individual Members			\$14,015
				65. Direct Taxes			\$23,381
				66. Subtotal			\$1,063,601
				67. Withholding Taxes and Payroll Deductions			
				67a. Total Withheld		\$62,297	
				67b. Less Total Disbursed		\$61,891	
				67c. Total Withheld But Not Disbursed			\$406
				68. TOTAL DISBURSEMENTS			\$1,063,195

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SCHEDULE 1 - ACCOUNTS RECEIVABLE AGING SCHEDULE

FILE NUMBER: 024-254

Entity or Individual Name (A)	Total Account Receivable (B)	90-180 Days Past Due (C)	180+ Days Past Due (D)	Liquidated Account Receivable (E)
Totals from all other accounts receivable				
TOTALS (Column (B) Total will be automatically entered in Item 23, Column (B))	\$0	\$0	\$0	\$0

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SCHEDULE 2 - LOANS RECEIVABLE

FILE NUMBER: 024-254

List below loans to officers, employees, or members which at any time during the reporting period exceeded \$250 and list all loans to business enterprises regardless of amount. (A)	Loans Outstanding at Start of Period (B)	Loans Made During Period (C)	Cash (D)(1)	Other Than Cash (D)(2)	Loans Outstanding at End of Period (E)
Total of loans not listed above					
Total of all lines	\$0	\$0	\$0	\$0	\$0
	Item 24	Item 61	Item 45	Item 69	Item 24

Totals will be automatically entered in...	Column (A)		with Explanation	Column (B)
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SCHEDULE 3 - SALE OF INVESTMENTS AND FIXED ASSETS

FILE NUMBER: 024-254

Description (if land or buildings give location) (A)	Cost (B)	Book Value (C)	Gross Sales Price (D)	Amount Received (E)
Vehicle (Grand Marquis)	\$19,817	\$7,404	\$0	\$6,500
Total of all lines	\$19,817	\$7,404	\$0	\$6,500
			14. Less Reinvestments	\$0
(Net Sales total will automatically entered in Item 43)			15. Net Sales	\$6,500

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SCHEDULE 4 - PURCHASE OF INVESTMENTS AND FIXED ASSETS

FILE NUMBER: 024-254

Description (if land or buildings, give location) (A)	Cost (B)	Book Value (C)	Cash Paid (D)
Vehicle	\$28,445	\$28,445	\$28,445
Total of all lines	\$28,445	\$28,445	\$28,445
			14. Less Reinvestments
(Net Purchases total will automatically entered in Item 60)			15. Net Purchases

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SCHEDULE 5 - INVESTMENTS

FILE NUMBER: 024-254

Description (A)	Amount (B)
Marketable Securities	
1. Total Cost	
2. Total Book Value	
3. List each marketable security which has a book value over \$5000 and exceeds 5% of Line 2.	
Other Investments	
4. Total Cost	
5. Total Book Value	
6. List each other investment which has a book value over \$5,000 and exceeds 5% of Line 5. Also, list each subsidiary for which separate reports are attached.	
7. Total of Lines 2 and 5 (Total will be automatically entered in Item 26, Column(B))	\$0

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SCHEDULE 6 - FIXED ASSETS

FILE NUMBER: 024-254

Description (A)	Cost or Other Basis (B)	Total Depreciation or Amount Expensed (C)	Book Value (D)	Value (E)
1. Land (give location)	\$0		\$0	\$0
3. Building	\$861,358	\$610,041	\$251,317	\$251,317
3. Building Improvements	\$142,116	\$17,788	\$124,328	\$124,328
5. Automobiles and Other Vehicles	\$47,188	\$15,493	\$31,695	\$31,695
6. Office Furniture and Equipment	\$32,708	\$24,488	\$8,220	\$8,220
7. Other Fixed Assets	\$215,640	\$37,981	\$177,659	\$177,659
8. Totals of Lines 1 through 7 (Column(D) Total will be automatically entered in Item 27, Column(B))	\$1,299,010	\$705,791	\$593,219	\$593,219

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SCHEDULE 7 - OTHER ASSETS

FILE NUMBER: 024-254

Description (A)	Book Value (B)
Deposits	\$10,389
Total Other Assets (Total will be automatically entered in Item 28, Column(B))	\$10,389

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SCHEDULE 8 - ACCOUNTS PAYABLE AGING SCHEDULE

FILE NUMBER: 024-254

Entity or Individual Name (A)	Total Account Payable (B)	90-180 Days Past Due (C)	180+ Days Past Due (D)	Liquidated Account (E)
Total from all other accounts payable	\$0	\$0	\$0	\$0
Total Accounts Payable (Column(B) Total will be automatically entered in Item 30, Column(D))	\$0	\$0	\$0	\$0

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SCHEDULE 9 - LOANS PAYABLE

FILE NUMBER: 024-254

Source of Loans Payable at Any Time During the Reporting Period	Loans Owed at Start of Period	Loans Obtained During Period	Repayment During Period	Repayment During Period	Loans Owed at End of Period
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Time During the Reporting Period (A)	Start of Period (B)	During Period (C)	Cash (D)(1)	Other Than Cash (D)(1)	End of Period (E)
Total Loans Payable	\$0	\$0	\$0	\$0	\$0
Totals will be automatically entered in...	Item 31 Column (C)	Item 44	Item 62	Item 69 with Explanation	Item 31 Column (D)

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SCHEDULE 10 - OTHER LIABILITIES

FILE NUMBER: 024-254

Description (A)	Amount at End of Period (B)
Total Other Liabilities (Total will be automatically entered in Item 33, Column(D))	\$0

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SCHEDULE 11 - ALL OFFICERS AND DISBURSEMENTS TO OFFICERS

FILE NUMBER: 024-254

(A) Name	(B) Title	(C) Status	(D) Gross Salary Disbursements (before any deductions)	(E) Allowances Disbursed	(F) Disbursements for Official Business	(G) Other Disbursements not reported in (D) thru (F)	(H) TOTAL		
A David W Fenton B Business Manager C C			\$87,043				\$87,043		
Schedule 15 Representational Activities	37 %	Schedule 16 Political Activities and Lobbying	8 %	Schedule 17 Contributions	0 %	Schedule 18 General Overhead	17 %	Schedule 19 Administration	38 %
A Douglas P Nelson B Business Agent C C			\$79,776				\$79,776		
Schedule 15 Representational Activities	24 %	Schedule 16 Political Activities and Lobbying	2 %	Schedule 17 Contributions	2 %	Schedule 18 General Overhead	34 %	Schedule 19 Administration	38 %
A William J Mellon B Recording Secretary C P			\$250				\$250		
Schedule 15 Representational Activities	50 %	Schedule 16 Political Activities and Lobbying		Schedule 17 Contributions		Schedule 18 General Overhead		Schedule 19 Administration	50 %
A William A Warren B Treasurer C C			\$625				\$625		
Schedule 15 Representational Activities	100 %	Schedule 16 Political Activities and Lobbying		Schedule 17 Contributions		Schedule 18 General Overhead		Schedule 19 Administration	
A Francis M Welch B President C C			\$2,250				\$2,250		
Schedule 15 Representational Activities	50 %	Schedule 16 Political Activities and Lobbying		Schedule 17 Contributions		Schedule 18 General Overhead		Schedule 19 Administration	50 %
A Erica M Followwill B Recording Secretary C N			\$250				\$250		
Schedule 15 Representational Activities	50 %	Schedule 16 Political Activities and Lobbying		Schedule 17 Contributions		Schedule 18 General Overhead		Schedule 19 Administration	50 %
Total Officer Disbursements			\$170,194		\$0	\$0	\$0	\$170,194	
Less Deductions									
Net Disbursements								\$170,194	

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SCHEDULE 12 - DISBURSEMENTS TO EMPLOYEES

FILE NUMBER: 024-254

(A) Name	(B) Title	(C) Other Payer	(D) Gross Salary Disbursements (before any deductions)	(E) Allowances Disbursed	(F) Disbursements for Official Business	(G) Other Disbursements not reported in (D) thru (F)	(H) TOTAL	
A Patty A Greene B Union Secretary C C			\$46,558				\$46,558	
Schedule 15 Representational Activities		Schedule 16 Political Activities and Lobbying		Schedule 17 Contributions		Schedule 18 General Overhead	100 %	Schedule 19 Administration
TOTALS RECEIVED BY EMPLOYEES MAKING LESS THAN \$10000								
Schedule 15 Representational Activities		Schedule 16 Political Activities and Lobbying		Schedule 17 Contributions		Schedule 18 General Overhead		Schedule 19 Administration
Total Employee Disbursements			\$46,558	\$0	\$0	\$0	\$46,558	
Less Deductions								
Net Disbursements							\$46,558	

SCHEDULE 13 - MEMBERSHIP STATUS

FILE NUMBER: 024-254

Category of Membership (A)	Number (B)	Voting Eligibility (C)
Journeyman Electricians - pay 4% working dues	373	Yes
Apprentice Electricians - pay 4% working due	55	Yes
Technicians - pay 4% of working dues	17	Yes
Members	445	
Agency Fee Payers*		
Total Members/Fee Payers	445	

*Agency Fee Payers are not considered members of the labor organization.

DETAILED SUMMARY PAGE - SCHEDULES 14 THROUGH 19

FILE NUMBER: 024-254

SCHEDULE 14 OTHER RECEIPTS	
1. Named Payer Itemized Receipts	\$0
2. Named Payer Non-itemized Receipts	\$0
3. All Other Receipts	\$22,928
4. Total Receipts	\$22,928

SCHEDULE 17 CONTRIBUTIONS, GIFTS & GRANTS	
1. Named Payee Itemized Disbursements	\$0
2. Named Payee Non-itemized Disbursements	\$0
3. To Officers	\$1,596
4. To Employees	\$0
5. All Other Disbursements	\$344
6. Total Disbursements	\$1,940

SCHEDULE 15 REPRESENTATIONAL ACTIVITIES	
1. Named Payee Itemized Disbursements	\$0
2. Named Payee Non-itemized Disbursements	\$366,296
3. To Officers	\$53,352
4. To Employees	\$0
5. All Other Disbursements	\$58,636
6. Total Disbursements	\$478,284

SCHEDULE 18 GENERAL OVERHEAD	
1. Named Payee Itemized Disbursements	\$8,452
2. Named Payee Non-itemized Disbursements	\$45,678
3. To Officers	\$41,921
4. To Employees	\$46,558
5. All Other Disbursements	\$8,770
6. Total Disbursements	\$151,379

SCHEDULE 16 POLITICAL ACTIVITIES AND LOBBYING	
1. Named Payee Itemized Disbursements	\$0
2. Named Payee Non-itemized Disbursements	\$0
3. To Officers	\$8,559
4. To Employees	\$0
5. All Other Disbursements	\$1,720
6. Total Disbursement	\$10,279

SCHEDULE 19 UNION ADMINISTRATION	
1. Named Payee Itemized Disbursements	\$0
2. Named Payee Non-itemized Disbursements	\$0
3. To Officers	\$64,766
4. To Employees	\$0
5. All Other Disbursements	\$33,703
6. Total Disbursements	\$98,469

SCHEDULE 14 - OTHER RECEIPTS

FILE NUMBER: 024-254

There was no data found for this schedule.

SCHEDULE 15 - REPRESENTATIONAL ACTIVITIES

FILE NUMBER: 024-254

Name and Address (A) IBEW 223 Def. Incom Plan 1587 10 Technology Park Wallingford CT 06492	Purpose (C)	Date (D)	Amount (E)
	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$25,452
	Total of All Transactions		\$25,452
	Type or Classification (B)	Market Recovery	
Name and Address (A) IBEW 223 Pension Fund 5817 10 Technology Park Wallingford CT 06492	Purpose (C)	Date (D)	Amount (E)
	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$163,461
	Total of All Transactions		\$163,461
	Type or Classification (B)	Market Recovery	
Name and Address (A) NE Electrical Workers Benefit Fund 1587 10 Technology Drive Wallingford CT 06492	Purpose (C)	Date (D)	Amount (E)
	Total Itemized Transactions		
	Total Non-Itemized Transactions		\$172,626
	Total of All Transactions		\$172,626
	Type or Classification (B)	Market Recovery	
Name and Address			

(A)	Purpose (C)	Date (D)	Amount (E)
Segal Roitman LLP			
110 Devonshire St., 5th flr Boston MA 02109			
Type or Classification (B)			
Legal			
Total Itemized Transactions			
Total Non-Itemized Transactions			\$4,757
Total of All Transactions			\$4,757

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SCHEDULE 16 - POLITICAL ACTIVITIES AND LOBBYING

FILE NUMBER 024-254

There was no data found for this schedule.

SCHEDULE 17 - CONTRIBUTIONS, GIFTS & GRANTS

FILE NUMBER: 024-254

There was no data found for this schedule.

SCHEDULE 18 - GENERAL OVERHEAD

FILE NUMBER: 024-254

Name and Address (A)	Purpose (C)	Date (D)	Amount (E)
Donna Botta			
33 Brimstone Drive Bridgewater MA 02324			
Type or Classification (B)			
Cleaning			
Total Itemized Transactions			
Total Non-Itemized Transactions			\$12,030
Total of All Transactions			\$12,030
Lawn-View Irrigation Landscaping			
884 Lakeville MA 02347			
Type or Classification (B)			
Landscaping and plowing			
Total Itemized Transactions			
Total Non-Itemized Transactions			\$8,195
Total of All Transactions			\$8,195
Middleboro Gas & Electric			
92 Middleboro MA 02346			
Type or Classification (B)			
Utilities			
Total Itemized Transactions			
Total Non-Itemized Transactions			\$8,720
Total of All Transactions			\$8,720
Nicholas LaPier PC CPA			
71 Park Avenue West Springfield MA 01089			
Type or Classification (B)			
Accountant			
Year end audit			06/30/2011 \$8,452
Total Itemized Transactions			\$8,452
Total Non-Itemized Transactions			
Total of All Transactions			\$8,452
Town of Lakeville			
346 Bedford Street Lakeville MA 02347			
Type or Classification (B)			
Real Estate Taxes			
Total Itemized Transactions			
Total Non-Itemized Transactions			\$9,600
Total of All Transactions			\$9,600
Verizon			
28003 Lehigh Valley			
Total Itemized Transactions			

PA 78002	Total Non-Itemized Transactions	\$7,133
Type or Classification (B)	Total of All Transactions	\$7,133
Telephone		

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SCHEDULE 19 - UNION ADMINISTRATION

FILE NUMBER: 024-254

There was no data found for this schedule.

SCHEDULE 20 - BENEFITS

FILE NUMBER: 024-254

Description (A)	To Whom Paid (B)	Amount (C)
Deferred Income	IBEW 223 Deferred Income	\$7,725
Health & Welfare	NE Electrical Workers Benefit	\$40,178
Pension	IBEW 223 Pension	\$46,892
Pension	NEBF	\$5,768
Total Benefits		\$100,563

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69. ADDITIONAL INFORMATION SUMMARY

FILE NUMBER: 024-254

Schedule 13, Row1:Journey electricians pay 4% working dues

Schedule 13, Row2:Apprentice Electricians pay 4% working dues.

Schedule 13, Row3:Technicians pay 4% working dues

Question 10: A- IBEW Local 223 Health & Welfare (FYE September 30) provides health, dental, vision, prescription and disability benefits for union members and their dependents. B- IBEW Local Union 223 Deferred Income Fund (FYE December 31). Contributions on behalf of participants are made by contributing employers of union members at rates established by collective bargaining agreements by the union and the related trust fund. C- IBEW Local Union 223 Pension Fund (FYE December 31). Contributions on behalf of participants are made by contributing employers of union members at rates established by collective bargaining agreements by the Union and the related trust fund.

Question 11(a): Local 223 IBEW PAC reports filed with Commonwealth of Massachusetts offices of Campaign and Political Finance.

Question 12: Audit performed by Nicholas LaPier, PC, CPA, 71 Park Avenue, West Springfield, MA 01089
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