



City of Cambridge

IN CITY COUNCIL

March 11, 1974

ORDERED:

That the City Manager be and hereby is authorized to accept a bequest from the Anna D. Behlen Trust in the sum of \$1,800.00, which trust states that "The portion of the trust estate remaining after distribution of the amounts as provided in Section A (Specific cash gifts) of Article 3 shall be distributed and paid over to the following organizations for their general uses and purposes, except as otherwise stated: Three percent (3%) to the City of Cambridge Home for the Aged and Poor, Cambridge, Massachusetts, as a fund, the income from which is to be used for the enjoyment and recreation of inmates".

In City Council March 11, 1974
 Adopted by yeas and nays Vote
 Yeas 8 Nays 0 Absent
Paul E. Leahy
 CITY CLERK Paul E. Leahy
 City Clerk

City of Cambridge

Agenda # 5 - Gift in the amount of MASSACHUSETTS
\$1,000.00 to the Home for the Aged
and Poor.

In City Council March 11, 19 74

	YEA	NAY	ABSENT	PRESENT
Mrs. Ackermann	✓			
Mr. Clinton	✓			
Mr. Danehy	✓			
Mr. Duehay	✓			
Mrs. Graham	✓			
Mr. Russell	✓			
Mr. Vellucci			✓	
Mr. Wylie	✓			
Mayor Sullivan	✓			
	8	0	1	



Cambridge Trust Company

1336 MASSACHUSETTS AVENUE
CAMBRIDGE · MASSACHUSETTS 02138

AREA CODE 617 876-5500

OFFICES: HARVARD SQUARE AND KENDALL SQUARE

December 31, 1973

Dr. James Hartgering
Cambridge Home for the Aged and Infirm
1493 Cambridge Street
Cambridge, Massachusetts 02139

Re: Anna D. Behlen Trust

Dear Dr. Hartgering:

The Cambridge Trust Company and Francis W. Phelan are trustees under deed of trust created by Mrs. Anna D. Behlen of 11 Royal Avenue, Cambridge, Massachusetts, on October 13, 1967 and as amended.

Mrs. Behlen died on January 24, 1972 and Mr. Robert B. Luick, an attorney with the firm of Sullivan and Worcester, 225 Franklin Street, Boston, was appointed executor for her estate.

Under the terms of Mrs. Behlen's will, except for certain dispositions of tangible personal property and an option to an individual to purchase her residence at 11 Royal Avenue, Cambridge, Massachusetts, at a stated price, the residue of her estate pours over to the trust created in 1967.

Briefly, the terms of Mrs. Behlen's trust provide as follows:

Article 2 to set aside \$50,000 in trust for her stepgranddaughter.

Article 2-A with the remaining property set aside 35% in trust for the benefit of a stepdaughter. Upon her death any remaining funds will be paid to charities who take under Article 3-B.

Article 3-B the balance 65% to various charities after payment of specific cash bequests of \$52,000. (Per Article 3-A) (All have been paid except for \$5,000 bequeathed to an individual who we believe is deceased and will therefore lapse.)

The trustees received a distribution of property from the estate early in 1973 and in addition sold certain real estate during the year. The executor has settled the federal estate taxes and is in the process of settling the Mass. inheritance taxes on present interests.

Page Two
December 31, 1973

Re: Anna D. Behlen Trust

We are holding approximately \$120,000 on account of the Article 3-B share in savings banks and U. S. treasury bills. We feel we can make a distribution at this time of approximately \$60,000 to the various charities. Your share of this amounts to \$1,800.

Excerpt from the Anna D. Behlen Trust per Article 3-B:

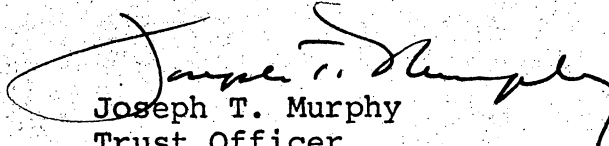
"The portion of the trust estate remaining after distribution of the amounts as provided in Section A (Specific cash gifts) of Article 3 shall be distributed and paid over to the following organizations for their general uses and purposes, except as otherwise stated:

- (6) Three percent (3%) to the City of Cambridge Home for the Aged and Poor, Cambridge, Massachusetts, as a fund, the income from which is to be used for the enjoyment and recreation of inmates."

Please be advised that before a final accounting and distribution can be completed the trustees must settle the future interest taxes with the Massachusetts Inheritance Tax Office. In addition it is understood that the remaining funds held by the estate due the trust are negligible.

Enclosed is a receipt acknowledging payment. Please sign and return in the self-addressed envelope.

Very truly yours,


Joseph T. Murphy
Trust Officer

JTM:jc
Enclosures



CITY OF CAMBRIDGE

CAMBRIDGE, MASSACHUSETTS 02139
Tel. 876-6800

EXECUTIVE DEPARTMENT

JOHN H. CORCORAN
City Manager

JAMES L. FARRELL
Assistant City Manager

March 11, 1974

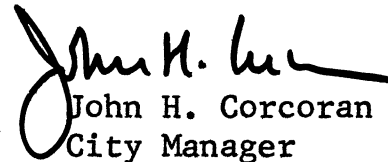
To the Honorable, the City Council:

It is respectfully requested that your Honorable Body accept a bequest in the amount of \$1,800.00 from the trust of Anna D. Behlen per Article 3-B of said trust, which designates "The portion of the trust estate remaining after distribution of the amounts as provided in Section A (Specific cash gifts) of Article 3 shall be distributed and paid over to the following organizations for their general uses and purposes, except as otherwise stated:

"Three percent (3%) to the City of Cambridge Home for the Aged and Poor, Cambridge, Massachusetts, as a fund, the income from which is to be used for the enjoyment and recreation of inmates."

Attached herewith please find proposed order of acceptance.

Very truly yours,


John H. Corcoran
City Manager

JHC/b

Agenda # 5

120

Gift in the amount of \$1800.00 to the Home
for the Aged and Poor.

In City Council;

March 11, 1974

3/11/74

Order

Adopted

P-0-1