$11,310,000
RHODE ISLAND HEALTH AND EDUCATIONAL BUILDING CORPORATION
PUBLIC SCHOOLS REVENUE BOND FINANCING PROGRAM REVENUE BONDS

SERIES 2013 H (TOWN OF LITTLE COMPTON ISSUE)

Dated: December 10, 2013
Due: May 15, 2015-2034

$11,310,000
RHODE ISLAND HEALTH AND EDUCATIONAL BUILDING CORPORATION
PUBLIC SCHOOLS REVENUE BOND FINANCING PROGRAM REVENUE BONDS

SERIES 2013 H (TOWN OF LITTLE COMPTON ISSUE)

		Responsibility
I.	**BASIC FINANCING DOCUMENTS**	
1.	Bond Purchase Agreement dated November 19, 2013 by and between the Underwriter and the Corporation	PSH
2.	Master Trust Indenture (Public Schools Revenue Bond Financing Program) dated as of November 1, 2009 by and between the Corporation and the Trustee	Edwards Wildman
3.	First Supplemental Indenture dated as of April 15, 2013 by and between the Corporation and the Trustee	Edwards Wildman
4.	Series Indenture dated December 10, 2013 by and between the Corporation and the Trustee	Edwards Wildman
5.	Financing Agreement dated November 19, 2013 by and between the Corporation and the Town	Edwards Wildman
6.	Amended and Restated Memorandum of Understanding by and among the Corporation, the General Treasurer and the State Controller acknowledged by the Rhode Island Department of Elementary and Secondary Education	Edwards Wildman
II.	**CORPORATION DOCUMENTS**	
7.	Certified copy of Act, Articles of Association, Oaths of Office of Directors and Certificate of Legal Existence of the Secretary of State of the State of Rhode Island of recent date	Edwards Wildman
8.	Certificate and Request of the Corporation as to due authorization, incumbency and other matters including: Exhibit A Authorizing Resolution dated October 17, 2013 Exhibit B By laws of the Corporation	Edwards Wildman
9.	Certificate of Corporation required by Bond Purchase Agreement	PSH
10.	Report of Proposed Debt Issuance to Public Finance Management Board	Edwards Wildman

		Responsibility
11.	Report of Final Sale to Public Finance Management Board	Edwards Wildman
12.	Specimen Bond	Edwards Wildman
13.	Tax Certificate	Edwards Wildman
14.	Internal Revenue Service Form 8038-G together with letter of transmittal and evidence of mailing	Edwards Wildman
15.	Certificate of Corporation Regarding Borrower Bonds	Edwards Wildman
16.	Receipt of Borrower Bonds	Edwards Wildman
III. BORROWER DOCUMENTS		
17.	Omnibus Certificate including: Exhibit A - Letter of Representation Exhibit B – Borrower Resolution: Chapter 010/011 of the Public Laws of 2012; a vote of the electorate at the May 1, 2012 special election; Town Council Resolution adopted September 6, 2012; and related Certificates	Edwards Wildman
18.	Certificate of the Borrower Required by the Bond Purchase Agreement	PSH
19.	Tax Certificate	Edwards Wildman
20.	Evidence of Accreditation by a Nationally Recognized Educational Accrediting Agency or Association	Edwards Wildman
21.	Report of Proposed Debt Issuance to Public Finance Management Board	Edwards Wildman
22.	Report of Final Sale to Public Finance Management Board	Edwards Wildman
23.	Borrower Bonds	Edwards Wildman

	Responsibility
24. Opinion of Counsel to Town	Edwards Wildman
IV. TRUSTEE DOCUMENTS	
25. Trustee's Certificate of Authority	Trustee
26. General Certificate of Trustee, Paying Agent and Registrar	Edwards Wildman
V. UNDERWRITER DOCUMENTS	
27. Preliminary Official Statement dated November 12, 2013	PSH
28. Official Statement dated November 19, 2013	PSH
29. Continuing Disclosure Agreement dated December 10, 2013 by and among the Corporation, the Borrower and the Trustee	PSH
30. Certificate of the Underwriter as to the Initial Offering Price	Edwards Wildman
31. Evidence of Bond Rating	Underwriter
32. Cross-Receipt	Edwards Wildman
VI. OPINIONS OF COUNSEL	
33. Approving Bond Opinion of Edwards Wildman Palmer LLP, as bond counsel	Edwards Wildman
34. Opinion of Edwards Wildman Palmer LLP as to issuance of Borrower Bonds	Edwards Wildman
35. Supplemental Opinion of Edwards Wildman Palmer LLP, as bond counsel	Edwards Wildman
36. Opinion of Moses Afonso Ryan Ltd., as counsel to the Corporation	MAR
37. Opinion of Partridge Snow & Hahn as counsel to the Underwriter	PSH
38. Opinion of Anderson Aquino LLP as counsel to the Trustee	AA

		Responsibility
VII.	**MISCELLANEOUS MATTERS**	
39.	UCC-1 Financing Statements naming the Corporation as "Debtor" and the Trustee as "Secured Party" filed with the Rhode Island Secretary of State as No. 201313349390 (Master Trust Indenture and Series Indenture)	Edwards Wildman
40.	UCC-1 Financing Statements naming the Borrower as "Debtor" and the Corporation as "Secured Party" filed with the Rhode Island Secretary of State as No. 201313349200 (Financing Agreement):	Edwards Wildman

PRINCIPAL PARTIES

ISSUER

Rhode Island Health and Educational Building Corporation "Issuer"
170 Westminster Street, Suite 1200
Providence, RI 02903

James K. Salome, Chairman
Robert Donovan, Executive Director
Telephone: (401) 831-3770
Facsimile: (401) 421-3910
Email: rdonovan@rihebc.com

COUNSEL TO THE ISSUER

Moses Afonso Ryan Ltd. "MAR"
170 Westminster Street, Suite 201
Providence, Rhode Island 02903

Antonio Afonso, Jr., Esquire
Telephone: (401) 453-3600
Facsimile: (401) 453-3604
Email: aafonso@marlawri.com

Daniel C. Waugh, Esquire
Email: dwaugh@marlawri.com

FINANCIAL ADVISOR

Public Financial Management, Inc. "PFM"
10 Weybosset Street, Suite 902
Providence, Rhode Island 02903

Stephen Maceroni, Senior Managing Consultant
Telephone: (401) 709-5111
Email: maceronis@pfm.com

Jennifer Arndt, Senior Managing Consultant
Telephone: (401) 709-5113
Email: arndtj@pfm.com

BOND COUNSEL

Edwards Wildman Palmer LLP "Edwards Wildman"
2800 Financial Plaza
Providence, Rhode Island 02903

Karen S.D. Grande, Esquire
Telephone: (401) 455-7608
Facsimile: (888) 325-9150
Email: kgrande@edwardswildman.com

Joe E. Forrester, Esquire
Telephone: (212) 912-2883
Facsimile: (888) 325-9820
Email: jforrester@edwardswildman.com

Claudia Matzko, Esquire
Telephone: (617) 239-0176
E-mail: cmatzko@edwardswildman.com

BORROWER

Town of Little Compton, Rhode Island "Town"
40 Commons
P.O. Box 226
Little Compton, Rhode Island 02837

Mary-Jane M. Harrington, Town Treasurer
Telephone: (401) 635-4219
Facsimile: (401) 635-2470

Robert L. Mushen, President of Town Council
Telephone: (401) 635-4529

Richard Humphrey, Town Solicitor
Telephone: (401) 624-6152

UNDERWRITER "Underwriter"

Roosevelt & Cross, Inc.
330 Roberts Street, Suite 201
East Hartford, Connecticut 06108

Frank DelVecchio, Senior Vice President
Telephone: (860) 244-3000 x776
Facsimile: (212) 504-9414
Email: fdelvecc@roosevelt-cross.com

One Exchange Plaza
55 Broadway – 22nd Floor
New York, New York 10006

Taylor W. Leach, Assistant Vice President
Telephone: (212) 504-9269
Facsimile: (212) 504-9416
Email: tleach@roosevelt-cross.com

F. Gregory Finn, Executive Vice President
Telephone: (212) 504-9269
Facsimile: (212) 504-9416
Email: gfinn@roosevelt-cross.com

UNDERWRITER'S COUNSEL "PSH"

Partridge Snow & Hahn LLP
180 South Main Street
Providence, Rhode Island 02903

Eugene G. Bernardo II, Esquire
Telephone: (401) 861-8200
Facsimile: (401) 861-8210
Email: egb@psh.com

Normand G. Benoit, Esquire
Telephone: (401) 861-8200
Facsimile: (401) 861-8210
Email: ngb@psh.com

TRUSTEE

U.S. Bank National Association "Trustee"
Corporate Trust Department
One Federal Street, 3rd Floor
Boston, Massachusetts 02110

David W. Doucette
Telephone: (617) 603-6534
Facsimile: (617) 603-6683
E-mail: david.doucette@usbank.com

COUNSEL TO TRUSTEE

Anderson Aquino LLP "AA"
240 Lewis Wharf
Boston, Massachusetts 02110

David T. Anderson, Esquire
Telephone: (617) 723-3600
Facsimile: (617) 723-3699
Email: danderson@andersonaquino.com

Borrower	Principal Amount	Authorized Amount	Authority	Election Date	Resolution/ Ordinance
Little Compton	$11,310,000	$11,310,000	Ch. 010/011 of the Public Laws of 2012	05/01/12	09/06/12