



TOWN COMMISSION MEETING

TUESDAY, APRIL 23, 2024

10:00 A.M.



**PUBLIC NOTICE/AGENDA
TOWN COMMISSION MEETING
Tuesday April 23rd, 2024 at 10:00 a.m.**

Town Commission	Town Staff
John Deese, Mayor _____	Linda Stumpf, Town Manager _____
Simone Bonutti, Vice Mayor _____	Eric Marmer, Ass't. Town Manager _____
Elliot Bonner, Mayor Pro Tem _____	Carmen Mattox, Chief of Police _____
Orla Imbesi, Commissioner _____	Erika Petersen, Town Clerk _____
David Knobel, Commissioner _____	Keith W. Davis, Town Attorney _____
Dwight Kulwin, Commissioner _____	Trey Nazzaro, Ass't. Town Attorney _____
Cindy McMackin, Commissioner _____	Brent Watson, Waterplant Superintendent _____

CALL TO ORDER & PLEDGE OF ALLEGIANCE

SPECIAL PRESENTATION: Representative Michael Caruso – Legislative Update

AGENDA ADDITIONS, DELETIONS OR SUBSTITUTIONS

MAYOR'S COMMENTS

CONSENT AGENDA:

1. Minutes March 26th, 2024 Town Commission Meeting
2. Police Department Report and Fire/Rescue Response Time Report for March
3. Renewal & First Amendment to Interlocal Wastewater Service and Wastewater Facilities Cost Sharing Agreement with Lake Worth

REGULAR AGENDA: *Quasi-Judicial Hearing

1. ***VAR 24-1 – 2000 S. Ocean Blvd.** – Florida Realty, LLC seeks the Town Commission's approval for a variance from applicable sections of the Town Code in order to add accessory structures (studio and guest house) to a nonconforming property, where Town Zoning Code Sec. 151.643(B) requires that nonconforming buildings and/or structures shall not be enlarged upon, expanded, increased or extended to occupy a greater area of land or over water, nor shall they be relocated in whole or in part to any portion of a lot or parcel, nor shall they be used as grounds for adding other buildings and/or structures prohibited elsewhere in the same District except for the expansion of existing single-family residence or accessory structure which does not increase the particular nonconformity.
2. Awarding of Contract for Auditing services
3. Town Manager Stumpf's Report

PUBLIC COMMENTS

OTHER BUSINESS

ADJOURNMENT

PLEASE TAKE NOTICE AND BE ADVISED, that if any interested person desires to appeal any decision made by the Town Commission, Special Magistrate or any other Boards or Commissions of the Town with respect to any matter considered at this meeting or hearing, such interested person will need a record of the proceedings, and for such purpose may need to insure that a verbatim record of the proceedings is made, which record includes the testimony and evidence upon which the appeal is to be based. The meeting/hearing will be continued from day to day, time to time, place to place, as may be found necessary during the aforesaid meeting. **IN ACCORDANCE WITH THE PROVISIONS OF THE AMERICANS WITH DISABILITIES ACT (ADA), THIS DOCUMENT CAN BE MADE AVAILABLE IN AN ALTERNATE FORMAT (LARGE PRINT) UPON REQUEST AND SPECIAL ACCOMMODATIONS CAN BE PROVIDED UPON REQUEST WITH THREE (3) DAYS ADVANCE NOTICE.** Please contact the Town Clerk at (561) 585-9477 - 600 South Ocean Blvd., Manalapan, FL 33462 - townhall@manalapan.org



TOWN OF MANALAPAN AGENDA ITEM SUMMARY

Meeting Date: April 23rd, 2024

Agenda Item No.: CA.1

Agenda Item Name: March 26th, 2023 Town Commission Meeting Minutes

ACTION REQUESTED: Discussion ☐ Approval ☒

ATTACHMENT:

- March 26th, 2023 Town Commission Meeting Minutes



Town Commission Meeting
Tuesday March 26th, 2024, at 10:00 a.m.

IN ATTENDANCE

TOWN COMMISSION		TOWN STAFF	
John Deese, Mayor	✓	Linda Stumpf, Town Manager	✓
Simone Bonutti, Vice Mayor	✓	Eric Marmer, Ass't. Town Manager	✓
Elliot Bonner, Mayor Pro Tem	✓	Carmen Mattox, Chief of Police	✓
Orla Imbesi, Commissioner	✓	Erika Petersen, Town Clerk	✓
David Knobel, Commissioner	✓	Keith Davis, Town Attorney	✓
Dwight Kulwin, Commissioner	✓	Trey Nazzaro, Ass't. Town Attorney	X
Cindy McMackin, Commissioner	✓	Brent Watson, Water Plant Superintendent	✓

PUBLIC: Kim Jones, Hugh Bruder, Jennifer Adams, Peter Bonutti (1680 SOB), Lisa Tropepe, Charles Coyle, Tara Cardosa, Geraldine Jaramillo, and Anne Geggis (Coastal Star)

CALL TO ORDER & PLEDGE OF ALLEGIANCE

Town Commission meeting was called to order at 10:01 a.m.

AGENDA ADDITIONS, DELETIONS OR SUBSTITUTIONS

Mayor Deese announced Senator Bobby Powell's legislative update was postponed as he did not make it to the meeting.

REORGANIZATION

The following commissioners were elected by virtue of no opposition: Orla Imbesi #2, Dwight Kulwin Seat #4, Elliot Bonner Seat #6. The following commissioners were appointed by virtue of no opposition: Cindy McMackin, Seat #1 and John Deese #7 (Mayor). Town Clerk Petersen swore them in.

Mayor Deese recommended that Simone Bonutti be appointed Vice Mayor and Elliot Bonner be appointed Mayor Pro Tem.

Mayor Deese introduced **Resolution 02-2024**.

Commissioner Knobel made a motion to **approve Res. 02-2024** naming Simone Bonutti as Vice Mayor and Elliot Bonner as Mayor Pro Tem. Commissioner Kulwin seconded the motion which prevailed by the following vote:

YES: Vice Mayor Bonutti, Mayor Pro Tem Bonner, Commissioner Imbesi, Commissioner Knobel, Commissioner Kulwin, and Commissioner McMackin

Mayor Deese **recommended** the following appointments to the Architectural Commission:

Architectural Commission:

Seat 1- Stewart Satter (**Appoint**)

Seat 2- Kristin Rosen (**No Change**)

Seat 3- Hank Siemon (**No Change**)

Seat 4- Ken Ray (**No Change**)

Seat 5- Niki Peterson (**Appoint**)

Alt. #1- Russel Bernard (**Re-Appoint**)

Alt. #2- Steven Locante (**Appoint**)

Mayor Deese **recommended** the following appointments to the Building Board of Adjustments & Appeals:

Building Board of Adjustments and Appeals

Seat 1- Vacant

Seat 2- Gregory Bonner (**No Change**)

Seat 3-Thomas Biggs (**Re-Appoint**)

Seat 4- Vacant

Seat 5- Stuart Lepera (**Re-Appoint**)

Vice Mayor Bonutti made a motion to **approve** the recommendations to the Architectural Commission. Commissioner Knobel seconded the motion which prevailed by the following vote:

YES: Vice Mayor Bonutti, Mayor Pro Tem Bonner, Commissioner Imbesi, Commissioner Knobel, Commissioner Kulwin, and Commissioner McMackin

CONSENT AGENDA

- 1. Minutes February 28th, 2024 Town Commission Meeting**
- 2. Police Department Report and Fire/Rescue Response Time Report for February**
- 3. Amendment to the Procurement & Purchasing Policy Setting New Thresholds**
- 4. RES 03-2024 Declaration of Opposition to Form 6**

Vice Mayor Bonutti made a motion to **approve** the Consent Agenda. Commissioner Imbesi seconded the motion which prevailed by the following vote:

YES: Vice Mayor Bonutti, Mayor Pro Tem Bonner, Commissioner Imbesi, Commissioner Knobel, Commissioner Kulwin, and Commissioner McMackin

REGULAR AGENDA

RA. 1 Discussion Regarding Fire Rescue Services

Town Manager Stumpf addressed the Commissioners and gave an overview of the process leading up to the two Fire Rescue contracts before them for discussion and review. She explained that Palm Beach County Fire provided as part of their contract credits for utilities which would come out to roughly \$25,000 annually that would be reimbursed.

Chief Hugh Bruder from Boynton Beach Fire Rescue made public comments.

Mayor Pro Tem Bonner made a motion to **approve** the Fire Rescue Contract with Palm Beach County Fire Rescue. Commissioner Kulwin seconded the motion which prevailed by the following vote:

YES: Vice Mayor Bonutti, Mayor Pro Tem Bonner, Commissioner Imbesi, Commissioner Knobel, Commissioner Kulwin, and Commissioner McMackin

RA. 2 Vice Mayor Bonutti's Request to Discuss Several Beach Issues

Town Manager Stumpf explained that Dr. Peter Bonutti, 1680 S. Ocean Blvd, had a short PowerPoint presentation to make under public comments for this agenda item.

Dr. Peter Bonutti discussed various issues regarding beach erosion, the sand transfer plant, mechanical beach raking and the disruption of sea turtle nests along the Town's beaches.

Mayor Deese commented that he knew Town staff had been researching some of the issues. Town Manager Stumpf explained that there was no longer a permit that dictated how much sand could be pumped out through the Plant as Dr. Bonutti had stated. She went on to say that there is no longer an agreement between Palm Beach County (the sand transfer plant owners) and the Town of Manalapan. Commissioner Kulwin asked for an explanation of the sand transfer plant. Town Manager Stumpf responded that the sand travels north to south and causes a build-up of sand at the inlet. The sand transfer plant pumps the sand to keep the inlet clear for boat traffic. She also told the Commissioners that the Town had reached out to DEP and was provided some information on landscaping that could protect dunes against beach erosion. Chief Mattox discussed ways to keep trespassers off of private beaches. Assistant Town Manager Marmer explained that DEP had advised that mechanical beach raking does not cause erosion. Vice Mayor Bonutti asked if there were any companies that could do a beach vulnerability study. Town Manager Stumpf responded that since it is on private property, it would be difficult to use public funds for that type of a study. Commissioner McMackin asked if there was ever the consideration for the sand taken at the sand transfer plant to go back to the Manalapan beach. Assistant Town Manager Marmer responded that the sand flowing north to south would cause a sandbar to develop which is the reason why the sand transfer pump exists at that location.

Mayor Deese invited members of the public to comment.

Dr. Peter Bonutti announced he wanted to rebut some of the comments made. He stated that the sand transfer plant does not suction sand to keep the inlet open. Additionally, he stated that it was the only sand transfer plant on the east coast of the United States. He went on to say he believes it is causing erosion to Manalapan beaches

and that he believes there are regulations as to the amount of sand that can be removed. Dr. Bonutti stated that the sand transfer plant only benefits the Town of Ocean Ridge. He also made comments regarding the Town's permitting of mechanical beach raking.

Kim Jones, resident of Ocean Ridge, urged the Commission to ban mechanical beach raking during turtle nesting season. She stated there were detrimental effects to the nest due to beach raking.

Dave Rowland, owner of Beach Keeper Inc., spoke to the Commission disputing some of the comments made by other members of the public. He stated he has clients in the Town of Manalapan that want their beaches cleaned. Commissioner Imbesi had questions about the mean water line and where he was legally allowed to clean and cross.

Mayor Deese thanked the people that spoke during public comments and added that he and the other Commissioners were taking their concerns and comments seriously and would review all of the available data.

Commissioner McMackin stated she was interested in seeing the data and regulations pertaining to the plant that were discussed.

Town Attorney Davis made comments about the appropriate steps forward and commented that other communities he has worked in have discussed beach erosion issues as well. Mayor Deese asked if it would be appropriate for them to hold a workshop. Town Attorney Davis responded in the affirmative.

RA. 3 Town Manager Stumpf's Report

Lands End Road Cul de Sac Update: Town Manager Stumpf directed the Commissioners to the landscape plans that were provided for the three cul de sacs by landscape architect, Lynn Bender. She noted the Town was still awaiting pricing.

Code Enforcement: Town Manager Stumpf told the Commissioners that our code enforcement officer would be in Town more often and doing thorough checks of construction sites to ensure proper permitting.

Election: She announced we had 41 people voted in the Town, which was a large turnout for us especially for a primary.

Iguanas: Town Manager Stumpf stated that the iguana removal was still taking place, but it wasn't as busy as earlier in the year.

Library: Town Manager Stumpf notified the Commissioners that Town Clerk Petersen with the assistance of library volunteers, had a book sale that brought in \$541. She also noted that 29 people had attended the last lecture. She announced the last lecture of the season was scheduled for April 4th and it would be a resident and author, Chris Peterson. Lastly, she informed the Commissioners that Yoga classes were still going strong and there was an average of 10 people attending each day.

Assistant Town Manager Marmer commented that staff would be looking into studies of the beach that have been provided.

Mayor Deese acknowledged the Palm Beach County Fire Rescue (PBCFR) representatives that were in attendance. Chief Kennedy from PBCFR thanked the Commission and staff for the opportunity to continue to provide services to the Town.

Vice Mayor Bonutti asked if the Town could look into the issues with the Lantana Bridge. Chief Mattox responded that it is owned by Palm Beach County but that he has reached out to them to discuss how often the bridge is closing and how long it is taking to reopen.

Town Manager Stumpf directed the Commission to the proposed meeting calendar in front of them. She asked the Commissioners for their availability for the upcoming meeting dates.

PUBLIC COMMENTS

There were none.

OTHER BUSINESS

There were none.

The Town Commission meeting adjourned at 11:19 a.m.

**These minutes were presented to the Town Commission
on Tuesday April 23rd, 2024 for approval.**

John Deese, Mayor

Date Signed

Erika Petersen, Town Clerk

Date Signed



TOWN OF MANALAPAN

AGENDA ITEM SUMMARY

Meeting Date: April 23rd, 2024

Agenda Item No.: CA.2

Agenda Item Name: Police Department Chief's Report and Palm Beach County Fire Rescue Response Times for March

ACTION REQUESTED: Discussion ☐ Action ☒

ATTACHMENT:

- The Police Department Chief's Report for March including Monthly Stats
- Palm Beach County Fire/Rescue response times for March

TO: Mayor and Town Commissioners
Linda Stumpf, Town Manager

FROM: Chief Mattox

SUBJECT: Monthly Report for April

DATE: April 15, 2024

Staffing

We currently have one full-time vacant position. Officer Turner is still currently employed. Officer Santiago has requested to be placed on part-time status.

Zone Coverage

We are maintaining three officer coverage on the midnight shift. We maintain three officer coverage on dayshift as staffing allows.

Fleet

All services and repairs are up to date. The new Chief's vehicle is in service. The Lieutenant's vehicle was turned over to the Sanitation Department and the Lieutenant inherited the Chief's old vehicle,

Training

All officers completed March's computer-based training. All officers have completed the FDLE mandatory sexual assault investigation training.

Miscellaneous

All the cameras are up and running except the sand pump camera as we are waiting on parts.

Attached are the weekend reports for the bicycle traffic detail that is being conducted each.

Erika Petersen is coordinating setting up CodeRed so we can keep the community posted of emergencies occurring in the community.



MANALAPAN POLICE DEPARTMENT

600 South Ocean Boulevard, Manalapan, Florida 33462-3398
Telephone (561) 585-4030 Fax (561) 547-7815
www.manalapan.org

To: Chief Mattox

From: Lt. Tracey Merritt ID# 52127

Reference: Bicycle traffic enforcement on 04-06-2024 and 04-07-2024

Sir,

As requested, Ofc. Turnof and myself conducted traffic enforcement on bicyclist on S. Ocean Blvd. for impeding traffic the flow of vehicular traffic. On Saturday April 6, 2024 the bicyclist traffic was very heavy due to a bicycle event. We had several groups of bicyclists with 20 or more bicycling together There was only one group that I got behind that had three cyclists did not get in a single line. I was the only vehicle behind them. Warning was given about impeding the flow of traffic. Traffic stop was conducted under CAD number 24-0005607 All other bicyclists were following Florida laws and not impeding traffic.

On Sunday April 7, 2024 Ofc. Temperato and myself conducted traffic enforcement on bicyclist on South Ocean Blvd. for impeding the flow of vehicular traffic. The bicyclist traffic was low and we only had a couple of groups with 15 or more bicyclist all were going at a fast pace and would be in a single file when traffic was behind them. All other bicyclist were following Florida laws and not impeding traffic

If additional information is needed, please let me know.

Lt. Tracey Merritt #52127



MANALAPAN POLICE DEPARTMENT

600 South Ocean Boulevard, Manalapan, Florida 33462-3398
Telephone (561) 585-4030 Fax (561) 547-7815
www.manalapan.org

To: Chief Mattox

From: Ofc. Stinnett 52150

Reference: Bicycle traffic enforcement

Sir,

As requested, Ofc. Turnof and myself conducted traffic enforcement on bicyclist on S. Ocean Blvd. impeding traffic flow. On Saturday March 23, 2024 the bicyclist traffic was very light due to weather. The few bicyclists that were out were following Florida laws and not impeding traffic this enforcement was documented under CAD number 24-0004787.

On Sunday March 24, 2024 there appeared to be some type of bike event with a few hundred bicyclist that had an FHP escort. The couple of groups with approximately 20 riders that were not in the escort maintained a single line while going through town allowing traffic to pass this enforcement was documented under CAD number 24-0004867.

If additional information is needed, please let me know.

Officer Stinnett 52150



MANALAPAN POLICE DEPARTMENT

600 South Ocean Boulevard, Manalapan, Florida 33462-3398
Telephone (561) 585-4030 Fax (561) 547-7815
www.manalapan.org

To: Chief Mattox

Date: 4/14/24

From: Ofc. Stinnett 52150

Reference: Bicycle traffic enforcement

Sir,

As requested, I conducted traffic enforcement on bicyclist on S. Ocean Blvd. impeding traffic flow. On Saturday April 13, 2024 was not done due to other events within Manalapan.

On Sunday April 14, 2024 the bicyclist traffic was slow with most only being single or double riders all following the law. A total of 4 larger groups of 20 or more came through with all following the law not to impede traffic flow by maintaining a single line or no traffic behind them. One large group of 40 plus rider stopped and asked about the law and how to stay in compliance. The state law of 316.2065 was explained as well as the towns expectations. The group thank me for the information so they could stay in compliance. A second group of 20 plus were traveling south on S. Ocean Blvd when traffic started to approach bicyclist began yelling single file and allowed traffic to pass. This enforcement was documented under CAD number 24-0006112.

If additional information is needed, please let me know.

Officer Stinnett 52150



MANALAPAN POLICE DEPARTMENT

600 South Ocean Boulevard, Manalapan, Florida 33462-3398

Telephone (561) 585-4030 Fax (561) 547-7815

www.manalapan.org

To: Chief Mattox

Date: 3/31/24

From: Ofc. Stinnett 52150

Reference: Bicycle traffic enforcement

Sir,

As requested, Ofc. Hadley and I conducted traffic enforcement on bicyclist on S. Ocean Blvd. impeding traffic flow. On Saturday March 30, 2024 we encountered 8 large groups of bicyclists with 20 or more riders all were following Florida law not impeding traffic by staying in a single line when traffic approached or maintaining the speed limit. One small group of 8 was observed traveling in 1500 block of S. Ocean Blvd coming south with traffic behind them and two of the eight riders failing to move over. Those two bicyclists were stopped in the 1300 block of S. Ocean Blvd and the law explained and issued citations for failing to move over for traffic this enforcement was documented under CAD number 24-0005225. Officer Hadley conducted a stop in the 2000 block of S. Ocean Blvd on a single bicyclist for failure to maintain lane. Once stopped the rider explained he had dropped his glasses on the ground and was trying to get them picked up before they were hit by a car. Based on those circumstances Officer Hadley issued a verbal warning and advised to use care when doing so. This stopped was documented under CADS number 24-0005226. I conducted another stop at approximately 1654 hour in the 800 block of S. Ocean Blvd on two bicyclists for traveling the wrong direction on the roadway. They explained they were visiting from another country and staying at the EAU and did not know the law which was explained to them as well as the safety issues. Both bicyclists were given verbal warnings. This stop was documented under CADS number 24-0005236.

On Sunday March 31, 2024 the bicyclist traffic was slow with most only being single or double riders all following the law. A total of 4 larger groups of 20 or more came through with all following the law not to impede traffic flow by maintaining a single line, no traffic behind them or as one group had a motor scooter escort to maintain the speed limit. This enforcement was documented under CAD number 24-0005270.



Manalapan Police Department
Monthly Stats
March 2024



CALLS FOR SERVICE

Call Type	Total	Zone 1 Point	Zone 2 A1A	Zone 4 Out of Town	Zone 5 N. Inlet	Zone 6 Beach	Zone 7 Bird Island	Zone 8 Plaza & The EAU	Zone ORP
9-1-1 Abandoned	5								
9-1-1 Received	50								
9-1-1 Transfer	14	3	2					9	
Alarms	6	1	4					1	
Animal Complaints	7	4	1			2			
ATV Completed	136					136			
ATV Cancelled	70					70			
Assault	0								
Battery	0								
Boat/Marine Patrol	12								12
Burglary A / B / R / V	0								
Child Abuse	0								
Construction Site Checks	148	87	61						
Dark House Checks	158	54	46					58	
Distressed Swimmer	3					2	1		
Disturbance	2	1	1						
Domestic	1		1						
Drones	0								
Driving Under Influence	0								
Drug Law Violation	1							1	
Grand Theft Auto	0								
Lewd Acts	0								
Fire	2	1	1						
Fire Alarm	2		1					1	
Fraud	1		1						
Information	6	1	3					2	
Obscene Harrassing Calls	0								
Mental	0								
Medical	14	3	2					9	
Mutual Aid	0								
Open Door	0								
Ordinance Violations	9	8						1	
Plaza Walk and Talk	113							113	
Parking Enforcement	69	24	11					34	
Possession of Alcohol	0								
Property Damage	0								
Property Found	2				1			1	
Property Lost	1							1	
Service Calls	36	7	15	1	11			2	
Suspicious Incident	3		2					1	
Suspicious Person	4	2	1		1				
Suspicious Vehicle	10	2	7					1	
Stolen Vehicle Alerts-LPR	0								
Theft	0								
Traffic Crash	3							3	
Traffic Stops	258	16	237	2				2	1
Traffic Citations	108								
Trespass	7	1	4				1	1	
Vessel Stop	1								1

Warrant Arrest	0	Manalapan Police Department					
Welfare Check	1	Monthly Stats					1
Work Hour	0	March 2024					



Manalapan Police Department
Monthly Stats
March 2024



INCIDENT REPORTS

Case #	Incident Type	Zone	Note	Case #	Incident Type	Zone	Note
24-0032	Traffic Stop / Drugs	2	ARR	24-0043	Trespassing	8	
24-0033	Found Drugs	6		24-0044	Traffic Stop / Seize Tag	1	
24-0034	Crash	8		24-0045	Traffic Stop / DWLS	2	ARR
24-0035	Traffic Stop / No DL	8	ARR	24-0046	Info	2	
24-0036	Lost Property	8		24-0047	Domestic	2	ARR
24-0037	Found Property	8		24-0048	Found Property	5	
24-0038	Traffic Stop / No DL	2	ARR	24-0049	Traffic Stop / Drugs	2	
24-0039	Disturbance	1		24-0050	Traffic Stop / Drugs	2	NTA
24-0040	Susp Incident	2		24-0051	Traffic Stop / DWLS/REV	2	ARR
24-0041	Traffic Stop / Drugs	2	ARR				
24-0042	Crash	8					

MONTHLY TRAINING	MONTHLY DISPATCH CALLS			
In Service PLI - O/C Baton and Handcuffing		911	50	
		Non-Emergency	634	
		Total	684	



Palm Beach County Fire Rescue

Manalapan

03/01/2024 to 03/31/2024

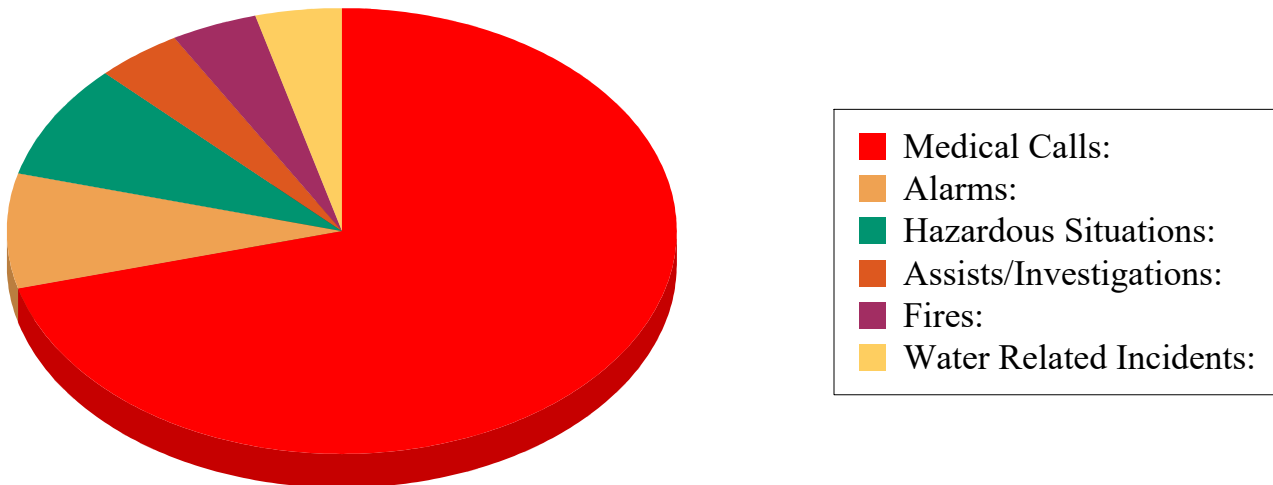
Average Response Times Disp Hand Turnout Travel Resp Time

Emergency Calls: 0:00:38 0:01:07 0:03:56 0:05:41

<u>Type - Situation Dispatched</u>	<u># of Incidents</u>	<u>%</u>
Medical Calls:	17	70.83%
Alarms:	2	8.33%
Hazardous Situations:	2	8.33%
Assists/Investigations:	1	4.17%
Fires:	1	4.17%
Water Related Incidents:	1	4.17%
Total	<u>24</u>	<u>100.00%</u>

Calls by Situation Dispatched

Manalapan





TOWN OF MANALAPAN AGENDA ITEM SUMMARY

Meeting Date: April 23rd, 2024

Agenda Item No.: CA.3

Agenda Item Name: Renewal & First Amendment to Interlocal Wastewater Service and Wastewater Facilities Cost Sharing Agreement

ACTION REQUESTED: Discussion ☐ Approval ☒

BACKGROUND:

Renewal and First Amendment to the Interlocal Agreement that was approved by the Town Commission on March 26, 2013.

ATTACHMENT:

- Renewal and First Amendment to Interlocal Wastewater Service and Wastewater Facilities Cost Sharing Agreement



TOWN OF MANALAPAN AGENDA ITEM SUMMARY

Meeting Date: April 23rd, 2024

Agenda Item No.: RA 1

Agenda Item Name: **Variance VAR 24-1** Florida Realty, LLC, 2000 S. Ocean Blvd.

ACTION REQUESTED: Discussion ☒ Approval ☐

BACKGROUND:

Variance-VAR-24-1. Florida Realty, LLC seeks the Town Commission's approval for a variance from applicable sections of the Town Code in order to add accessory structures (studio and guest house) to a nonconforming property, where Town Zoning Code Sec. 151.643(B) requires that nonconforming buildings and/or structures shall not be enlarged upon, expanded, increased or extended to occupy a greater area of land or over water, nor shall they be relocated in whole or in part to any portion of a lot or parcel, nor shall they be used as grounds for adding other buildings and/or structures prohibited elsewhere in the same District except for the expansion of existing single-family residence or accessory structure which does not increase the particular nonconformity.

ATTACHMENTS:

- Variance Application
- Development Drawings



VAR 24-01
2000 S. OCEAN
4/23/2024

TOWN OF MANALAPAN
600 South Ocean Boulevard, Manalapan, FL 33462
(561) 585-9477, Fax (561) 585-9498
townhall@manalapan.org www.manalapan.org

DEVELOPMENT APPLICATION

Submittal Date: February 29, 2024

Property Control # _____


PROPERTY OWNER(S)	AUTHORIZED AGENT (Required if owner not presenting)
Name: Florida Realty, LLC	Name: Carolee Rodebaugh
Address: 101 Ygnacio Valley Road, Suite 320 Walnut Creek, CA 94596	Address: 400 Clematis St #200 West Palm Beach, FL 33401
Phone: (925)627-2618	Phone: (561) 833-4707
E-mail: bmori@lawrenceinv.com	E-mail: Carolee@daileyjanssen.com

AUTHORIZED AGENT (Required if owner not presenting)
Name: Matthew H. Scott
Address: 200 East Broward Blvd, Suite 1800 Fort Lauderdale, FL 33301
Phone: (954) 298-0285
E-mail: Matthew.scott@gmlaw.com

ARCHITECT / LANDSCAPE ARCHITECT	DEVELOPER / CONTRACTOR:
Name: Carolee Rodebaugh	Name: John Rogers
Company Name: Dailey Janssen Architects	Company Name: Rogers General Contracting Corp
Address: 400 Clematis St #200 West Palm Beach, FL 33401	Address: 2475 Mercer Ave, Suite 301 West palm Beach, FL 33401
Phone: (561) 33-4707 Cell: (561) 670-3364	Phone: (561) 475-5870 Cell: (561) 701-3260
E-mail: Carolee@daileyjanssen.com	E-mail: jrogers@rogersgc.com

APPLICANT'S CERTIFICATION

(I) BARRY T. MORI (owner or authorized agent) affirm and certify that I understand and will comply with all provisions and regulations of the Town of Manalapan, Florida. I certify that all drawings and specifications for buildings or structures either larger than 500 sq. ft. or costing more than \$3,000 must be drawn or verified by a state registered architect or engineer and his seal of office imprinted thereon. Additionally, I certify that the drawings and specifications show full compliance and do fully comply with the Zoning Code. I understand that if any drawings or specifications are not in full compliance, the application will be rejected. If approved by the Town, the aforementioned real property described herein will be considered, in every respect, to be a part of the Town of Manalapan and will be subjected to all applicable laws, regulations, taxes and police powers of the Town including the Comprehensive Plan and Zoning Code. I further certify that all statements and diagrams submitted herewith are true and accurate to the best of my knowledge and belief. Further, I understand that this Application and attachments become part of the Official Records of the Town of Manalapan, Florida, and are not returnable.

Signature-Owner or Authorized Agent 

Print Name **Barry T. Mori, Vice President**

STATE OF FLORIDA, COUNTY OF PALM BEACH

The foregoing instrument was acknowledged before me this _____ day of, 20____,

by _____ as _____ for _____.

Personally known _____ or Produced Identification 

Type of Identification _____

Notary Signature _____

SEAL

Print Notary Name _____

CHECK BELOW WHERE APPLICABLE

(Payable by check only)

ARCHITECTURAL REVIEW – Level 1 \$100		PUD or PUD AMENDMENT \$750	
ARCHITECTURAL REVIEW – Level 2 \$250		SITE PLAN REVIEW \$750	
ARCHITECTURAL REVIEW – Level 3 \$500	X	SPECIAL EXCEPTION USE \$750	
ARCHITECTURAL REVIEW – Level 4 \$1,000		VARIANCE \$750	X
PAVER AGREEMENT \$500		ZONING TEXT/MAP OR COMP PLAN AMENDMENT \$1500	

(See page 7 for definitions of Levels)

The owner, architect or other authorized agents are urged to attend the meeting. Each applicant must familiarize themselves with the Architectural Commission criteria and procedure. If all required information is not presented with this application, the project will not be placed on the agenda for review and consideration.

PLEASE NOTE: Although an application meets minimum zoning requirements the Architectural Commission may approve, approve with conditions, or disapprove a request not found to meet Architectural Review criteria as found in Town Code, Section 152.23. All residents are notified of applicant's request by mail.

**ALL APPLICATIONS MUST BE COMPLETE, SIGNED, NOTARIZED
AND SUBMITTED BY THE DEADLINE DATE**

1. This Application (pages 3-6)
2. Agent's Authorization Letter (Required if owner not presenting)
3. Application fee (see page 7)
4. Model, if applicable (see page 8)
5. 11 set of Plans; 2 Signed and Sealed -
We require two full-size sets signed and sealed and the other nine can be 11"x17" in size
6. Narrative letter describing the project
7. Samples, renderings, pdfs, jpegs and Power Point photos are due 14 days prior to meeting.

ACKNOWLEDGMENT

A notary public or other officer completing this certificate verifies only the identity of the individual who signed the document to which this certificate is attached, and not the truthfulness, accuracy, or validity of that document.

State of California
County of Contra Costa

On 02.27.24 before me, Wendy A. Klos, Notary Public
(insert name and title of the officer)

personally appeared Barry T. Mori
who proved to me on the basis of satisfactory evidence to be the person(s) whose name(s) is/are subscribed to the within instrument and acknowledged to me that he/she/they executed the same in his/her/their authorized capacity(ies), and that by his/her/their signature(s) on the instrument the person(s), or the entity upon behalf of which the person(s) acted, executed the instrument.

I certify under PENALTY OF PERJURY under the laws of the State of California that the foregoing paragraph is true and correct.

WITNESS my hand and official seal.

Signature W. Klos (Seal)



February 28, 2024

Florida Realty, LLC
Variance Justification Statement
Expansion to Nonconforming Buildings and Structures

A. Property Information Summary

Property Owner/Applicant	Florida Realty, LLC ("Applicant")
Address	2000 S. Ocean Blvd., Manalapan, FL 33462 ("Property")
General Location	east and west sides of S. Ocean Boulevard, north of Boynton Inlet
Parcel Control No.	42-43-45-10-01-000-0032 & 42-43-45-10-01-000-0032 (Island)
Zoning District	R1-B & R-1A (Island)
Future Land Use	Single-Family Residential
Size	+/- 22.436 acres (15.646 acres + 6.79 acres Island)
Existing Use	Residential estate

B. Tabular Summary of Requests

Variance Request	Proposed	Requirement	LDR Code Section
Addition of Studio and Guest House	Proposed addition of conforming accessory structures (Studio and Guest House) to the nonconforming Property	Extension or expansion; alteration and repairs. Nonconforming buildings and/or structures shall not be enlarged upon, expanded, increased or extended to occupy a greater area of land or over water, nor shall they be relocated in whole or in part to any portion of a lot or parcel, nor shall they be used as grounds for adding other buildings and/or structures prohibited elsewhere in the same District except for the expansion of existing single-family residence or accessory structure which does	151.1643(B)

		not increase the particular nonconformity. The "supplementary lot regulations" for all zoning Districts except C-3 allows this exception.	
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C. Background

Florida Realty, LLC proudly purchased the beautiful estate property historically known as "Gemini" in 2022 with a deep understanding of the need to care for the unique grounds and structures thereon. While Applicant unequivocally intends for the Property to remain a single-family home, it is understood that it is much more than that in the eyes of the Town of Manalapan and its residents. Applicant, thus, views itself as a steward of the Property, and in that role has engaged architectural and landscaping experts to assist with long-range planning and preservation for the future of the site.

As part of this planning exercise, Applicant is preparing a comprehensive landscape maintenance plan to promote the long-term health and protection of the numerous specimen trees and other vegetative material on site. Applicant also has identified the need to repair, remodel, and/or add to certain structures on the Property to address deferred maintenance issues, create necessary space for existing trees, and to help modernize the unique site. Applicant's vision is to make these improvements gradually over time. However, the most pressing structural modifications are the demolition and reconstruction of an existing, dilapidated boathouse and the construction a new guest house, both on the west side of Ocean Boulevard.

Applicant understands the entire Property and its structures are legally nonconforming and cannot be modified without obtaining a variance. Therefore, Applicant at this time is seeking a variance to authorize the construction of these two new structures. Please see enclosed site plan depicting the location, size, and details relating to the proposed new structures. Applicant respectfully requests approval of this variance as it will allow not only for improvements to the site to suit the needs of its new owner but also for the continued stewardship of this landmark Property.

D. Justification Statement

It is important to note Applicant is proposing to add fully code-compliant accessory structures. The variance is necessary because certain of the existing

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structures on site are legally non-confirming, but the new construction will comply with Code in all material respects. As Per Section 151.672(C)(1-6) of the Town's Code, in order to authorize a variance, the Town Commission must and shall find that the following criteria are met. Each of the criteria are listed below in **bold** with Applicant's justification below each in *italics*.

1. That special conditions and circumstances exist which are peculiar to the land or building involved and which are not applicable to other lands or buildings in the same zoning District.

It has long been recognized by the Town and the property owners over the years that these lands are special and unique. The Property has received several development approvals and variances since it was built. The Property is subject to an agreement with the Town dated October 27, 1987, recorded in Book 5489, Page 1191 of the public records of Palm Beach County. The agreement was subsequently amended as follows:

- ... On November 22, 1994, by the Town's approval of application for variances described in letters dated September 15, 1994, September 22, 1994 and October 10, 1994 and accompanying architectural plans, drawings and exhibits on file with the Town; (Modifications, additions to previously granted variances subject to the Original Recorded Agreement.)*
- ... On August 27, 1996, by the Town's approval of application for variances described in letters dated August 12, 1996 and August 16, 1996, and accompanying architectural plans, drawings and exhibits on file with the Town; (New entry gate; move Studio A on east side.)*
- ... On June 24, 1997, by the Town's approval of application for variances dated June 10, 1997, and accompanying architectural plans, drawings and exhibits on file with the Town; (Reduced square footage of house; increased square footage of studios.)*
- ... On November 25, 1997, by the Town's approval of application for variances dated November 13, 1997, and accompanying architectural plans, drawings and exhibits on file with the Town; (Front set back variance and lot, yard and bulk regulations variance.)*
- ... On April 28, 1998, by the Town's approval of application for variances dated April 16, 1998, and accompanying architectural plans, drawings and exhibits on file with the Town; (Modifications to basement and first and second floor, landscaping and studios A and B.)*
- ... On February 23, 1999, by the Town's approval of application for variances dated February 11, 1999, and accompanying architectural*

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- plans, drawings and exhibits on file with the Town; (Move Studios A and B; move north gate; delete middle gate; add new pedestrian gate.)
- ... On February 29, 2000, by the Town's approval of application for special exception dated January 25, 2000, and accompanying architectural plans, drawings and exhibits on file with the Town; (Pedestrian passageway.)
- ... On April 25, 2000, by the Town's approval of application for variances dated January 25, 2000, and accompanying architectural plans, drawings and exhibits on file with the Town; (Relocate northwest gate with 8' high stucco wall.) and
- ... On June 19, 2000, by the Town's approval of application for variances dated April 25, 2000, and accompanying architectural plans, drawings and exhibits on file with the Town. (build two 8' sections of site wall)
- ... First Amendment to Restatement of Previously Granted Development Approvals and Ratifications of Previously Recorded Agreement Relating to 2000 S Ocean (July 12, 2005)
- ... Second Amendment to Restatement of Previously Granted Development Approvals and Ratifications of Previously Recorded Agreement Relating to 2000 S Ocean (April 11, 2007)

As stated in the original agreement, the Town has recognized throughout the history of the development of the Property that there are certain unique aspects of the Property which are not common to and do not exist for other properties or other single-family residences located within the R1-A and R1-B zoning districts of the Town, including the following:

- ... The Property is improved with the only single-family residence within the Town zoning districts R1-A and R1-B where the primary residence extends underneath and to the east and west of Highway A-1-A, and such improvements have existed since the construction of the residence in 1947;
- ... The Property extends north and south in excess of 1200' feet, extends along a narrow portion of the barrier island east to the Atlantic Ocean and west to Lake Worth, and is divided by Highway A-1-A; and
- ... The Property's single family residential improvements are located well below the crown of the road of Highway A-1-A which crown is high above mean sea level, and thus such improvements and be better screened from view and buffered than other properties along Highway A-1-A in R1-A and R1-B zoning districts.

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2. That the special conditions and circumstances do not result from the actions of the applicant or his or her predecessor in interest.

The special conditions and unique aspects of the Property have existed since the construction of the original residence in 1947. Several variances have been granted by the Town Commission since that time, which indicate the Town's continued understanding of the special circumstances associated with the Property. The sheer size and layout of the Property speak to its special conditions, and neither of these features are a result of the actions of the Applicant.

3. That granting the variances requested will not confer on the applicant any special privilege that is denied by this chapter to other lands or structures in this same zoning District.

The proposed variances would allow the Applicant to construct an accessory studio and guest house structures on the Property. Per the Town's Code regarding nonconforming buildings and structures, they are not to be "...used as grounds for adding other buildings and/or structures prohibited elsewhere in the same District except for the expansion of existing single-family residence or accessory structure which does not increase the particular nonconformity." The studio and guest house would be conforming accessory structures and meet all other requirements of the Town's Code, and are not designed to increase the nonconformity status of the Property. The variance is needed to allow Applicant to construct these accessory structures which are otherwise permitted as of right for any other property in the same zoning district.

4. That literal interpretation of the provisions of this chapter would deprive the applicant of rights commonly enjoyed by other properties in the same zoning District under the terms of this chapter and would work unnecessary and undue hardships on the applicant.

The proposed accessory studio and guest house are consistent with the intent of the Code in that they are not increasing a nonconformity of the Property. They are conforming accessory structures designed to meet all other requirements of the Town's Code. A literal interpretation of the Code would prevent the Applicant from making any improvements and additions to the Property, which would be inconsistent with the approvals that have been granted to prior owners of the Property throughout its history as outlined above. Moreover, literal interpretation of the Code in this case would

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deprive Applicant of the ability to make any structural changes to its Property, which is a fundamental and unnecessary hardship.

5. That the variance granted is the minimum variance that will make possible the reasonable use of the land or structure, or both.

The Applicant is proposed to add a conforming accessory studio and guest house to the Property. The variance request is the minimum to allow for the proposed additions. The proposed accessory structures would conform to all other Code requirements of the Town, and are not inconsistent with prior improvements granted to prior owners of the Property. The variance would allow the Applicant to make minor and conforming additions, continuing the tradition of enhancing the unique and exceptional Property within the Town. In addition, with regard to the boathouse building Applicant is seeking to demolish and replace with a studio, the variance is reasonable as the boathouse structure is severely dilapidated and has reached the end of its useful life.

6. That the grant of the variance will be in harmony with the general intent and purpose of this chapter and that such variance will not be injurious to the area involved or otherwise detrimental to the public welfare.

Granting of the proposed variance would not alter or affect the harmony of the community or intent of the Town's Code. Importantly, none of the proposed improvements will be visible from the roadway, meaning they will have no impact on the public welfare. The Property and its proposed improvements would continue to be used as a single-family residence and would not increase the nonconformity of the Property. The studio and guest house would be conforming accessory structures and meet all other requirements of the Town's Code. The proposed variance is also consistent with the following policies of the Town's Comprehensive Plan:

...Policy 1.3.3 – Maintain the existing high quality of single family development throughout the community.

...Policy 1.3.19 – The Town of Manalapan shall continue to establish and enforce stringent standards for all demolitions and replacements, new construction, and building additions and alterations on vacant or development residential lots to ensure that all new development and redevelopment is compatible with the architectural style, scale, setbacks, and lot coverage of the surrounding neighborhoods and properties.

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E. Conclusion

Applicant is honored to be the new owner of “Gemini.” Ownership of a Property as special as this one requires commitment to care for it to ensure it is preserved long into the future. Applicant accepts this responsibility and has already undertaken substantial efforts to plan for the future of the Property. As part of that planning, Applicant has identified the need to replace an old, damaged boathouse and add a new guest house. Applicant respectfully requests a variance so it can construct these two structures and commence its stewardship of this amazing Property.

Respectfully submitted,

GREENSPOON MARDER LLP



By: Matthew H. Scott, Partner
For the Firm

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PROPOSED ACCESSORY STRUCTURES AT:
2000 SOUTH OCEAN BOULEVARD

MANALAPAN

VARIANCE AND ARCOM SUBMITTAL 04.18.24

PALM BEACH COUNTY, FLORIDA

BAYSIDE GUEST HOUSE & STUDIO BUILDING

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2000 SOUTH OCEAN BOULEVARD

DAILEY JANSSEN ARCHITECTS
400 CLEMATIS STREET, SUITE 200 WEST PALM BEACH, FLORIDA 33401, TEL: 561-833-4707, LICENSE #AA-C0019174

DATE: 11-06-2023
APPN:
VISIONS:
02.26.24 TOWN SUBMITTAL
04.IT.24 REVISION 01

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JANSSEN ARCHITECTS, P.A.
ALL RIGHTS RESERVED.

SEAL

GER P. JANSSEN AR-14785
DRAWING NO.

A0.00

3 NUMBER: 22-138

TITLE COMMITMENT REVIEW						
CLIENT: Florida Estates, LLC, a Delaware limited liability company		COMMITMENT NO. : 1062-6015835	DATE: 04/20/22			
REVIEWED BY: Craig Wallace		JOB NO. : 17-1234.19				
B2 ITEM NO.	DOCUMENT	DESCRIPTION	AFFECTS AND PLOTTED	AFFECTS AND NOT PLOTT-ABLE	DOES NOT AFFECT	NOT A SURVEY MATTER
1 - 8	N/A	Standard Exceptions				•
9	ORB 1922, PG 1247	Grant of Easement by and between Venture Real Estate, Inc., a Florida corporation and the Town of Manalapan, Florida, recorded August 10, 1971. Parcel 1	•			
10	ORB 6144, PG 265	Easement in favor of Florida Power & Light Company, for purposes of construction, operation and maintenance of overhead and underground electric utility facilities, (including wires, poles, guys, cables, conduits and appurtenant equipment) to be installed from time to time, with the right to reconstruct, improve, add to, enlarge, change the voltage, as well, as the size of and remove such facilities, or any of them within said easement, recorded July 28, 1989. Parcel 1	•			
11	RPB 5, PG 28	Subject to the Right-of-Way of State Road A1A aka Ocean Blvd; now laid out and in use and as shown. Parcel 1	•			
12a	ORB 5489, PG 1191	Terms and conditions contained in that certain Agreement between William B. Ziff, Jr. and his wife, Tamsen Ann Kojis Ziff and the Town of Manalapan, Florida, for purposes of variances, unity of title, maintenance and/or repair, recorded November 20, 1987. (South 90 feet) Parcel 1		•		
12b	ORB 5959, PG 1054	As affected by the Addendum Agreement recorded February 7, 1989. (All but South 90 feet) Parcel 1		•		
12c	ORB 17610, PG 1952	The Restatement of Previously Granted Development Approvals recorded October 7, 2004. Parcel 1		•		
12d	ORB 18893, PG 1819	First Amendment to Restatement of Previously Granted Approvals recorded July 12, 2005. Parcel 1		•		
12e	ORB 21613, PG 1266	Second Amendment to Restatement of Previously Granted Approvals recorded April 11, 2007. Parcel 1		•		
13	DB 678, PG 136 DB 718, PG 364 DB 718, PG 502 DB 755, PG 241 ORB 4715, PG 1300 ORB 10957, PG 1610	Covenants, conditions and restrictions in regard to building, setbacks and use contained in Warranty Deeds. Parcel 1	•			
14	ORB 22433, PG 1896	Terms and conditions contained in that certain Declaration of Restrictive Covenant by Ocean Boulevard Properties, L.L.C., a Florida limited liability company, recorded February 8, 2006 (Prohibiting a pedestrian passageway under South Ocean Boulevard, to provide underground access.) (Affects South 90 feet) Parcel 1		•		
15	ORB 32287, PG 1259	Terms and conditions as contained in Warranty Deed recorded March 16, 2021. Parcel 1		•		
16	ORB 80, PG 137	The Coastal Construction Control Line established pursuant to Section 161.052 and Section 161.053, Florida Statutes.	•			
17	N/A	Survey as to Parcel 1 prepared by Wallace Surveying Corp. dated September 4, 2019, job no. 17-1234.7, shows the following: a. 2 Wooden Docks extend into the Waters of Lake Worth on the West side of Parcel 1. b. The Company requires a signed, sealed and dated survey to delete the standard survey matters.	•			
18	DB 759, PG 258	Grant of spoil & settling basin. Easements to South Lake Worth Inlet District. Parcel 2	•			
19	ORB 363, PG 222	Restrictions, conditions, and reverter set forth in Fee Simple Deed from Town of Manalapan, Florida, to Venture Real Estate, Inc. Parcel 2	•			
20	ORB 1467, PG 247	Blanket Easement Agreement between Venture Real Estate, Inc., a Florida corporation and Town of Manalapan, Florida. Parcel 2	•			
21-22	N/A	Standard Exceptions				•
23	N/A	The public records do not show any legal right of access to or from the land, and, by reason thereof, the Company does not insure any right of access to and from the insured property.	•			
24	N/A	The right, title or interest, if any, of the public to use as a public beach or recreation area any part of the Land lying between the water abutting the Land and the most inland of any of the following: (a) the natural line of vegetation; (b) the most extreme high water mark; (c) the bulkhead line, or (d) any other line which has been or which hereafter may be legally established as relating to such public use.		•		
25	N/A	Rights of the United States Government to that part of the Land, if any, being artificially filled in land in what was formerly navigable waters arising by reason of the United States Government control over navigable waters in the interest of navigation and commerce.	•			
26	N/A	Any adverse ownership claim by the State of Florida by right of sovereignty to any part of the Land that is, as of the Date of Policy or was at any time previously, under water (submerged).		•		

LEGEND

A = ARC LENGTH
A/C = AIR CONDITIONING
A.E. = ACCESS EASEMENT
A.K.A. = ALSO KNOWN AS
ASPH. = ASPHALT
B.F.P. = BACKFLOW PREVENTOR
BLDG. = BUILDING
B.M. = BENCHMARK
B.O.C. = BACK OF CURB
B.O.W. = BACK OF WALK
(C) = CALCULATED
CATV = CABLE ANTENNA TELEVISION
C.B. = CHORD BEARING
C.B.S. = CONCRETE BLOCK STRUCTURE
C.C.C.L. = COASTAL CONSTRUCTION CONTROL LINE
CH = CHORD
C.L.F. = CHAIN LINK FENCE
CLR. = CLEAR
C.M.P. = CORRUGATED METAL PIPE
CONC. = CONCRETE
(D) = DESCRIPTION DATUM
D.B. = DEED BOOK
D.C.D.A. = DOUBLE CHECK DETECTOR ASSEMBLY
D.E. = DRAINAGE EASEMENT
D.H. = DRILL HOLE
DW. = DRIVEWAY
EL. = ELEVATION
ENC. = ENCROACHMENT
E.O.P. = EDGE OF PAVEMENT
E.O.W. = EDGE OF WATER
ESMT. = EASEMENT
F.D.C. = FIRE DEPARTMENT CONNECTION
F.F. = FINISHED FLOOR
FND. = FOUND
F.O.C. = FACE OF CURB
G.V.P. = GEORNEY VS. PIERSON
INV. = INVERT
I.T.W.C.D. = INDIAN TRAIL WATER CONTROL DISTRICT
L.A.E. = LIMITED ACCESS EASEMENT
L.B. = LICENSE BOARD
L.W.D.D. = LAKE WORTH DRAINAGE DISTRICT
(M) = FIELD MEASUREMENT
M.H. = MANHOLE
M.H.W.L. = MEAN HIGH WATER LINE
MIN. = MINIMUM
M.L.W.L. = MEAN LOW WATER LINE
N.A.V.D. = NORTH AMERICAN VERTICAL DATUM
N.G.V.D. = NATIONAL GEODETIC VERTICAL DATUM
N.P.B.C.I.D. = NORTHERN PALM BEACH COUNTY IMPROVEMENT DISTRICT
N.T.S. = NOT TO SCALE
O.A. = OVERALL
O.D. = OUTSIDE DIAMETER
OH. = OVERHEAD UTILITY LINE
O.R.B. = OFFICIAL RECORD BOOK
O/S. = OFFSET
P. = PLANTER
(P) = PLAT DATUM
P.B. = PLAT BOOK
P.B.C. = PALM BEACH COUNTY
P.C. = POINT OF CURVATURE
P.C.C. = POINT OF COMPOUND CURVATURE
P.C.P. = PERMANENT CONTROL POINT
PG. = PAGE
P.I. = POINT OF INTERSECTION
P/O. = PART OF
P.O.B. = POINT OF BEGINNING
P.O.C. = POINT OF COMMENCEMENT
P.R.C. = POINT OF REVERSE CURVATURE
P.R.M. = PERMANENT REFERENCE MONUMENT
PROP. = PROPOSED
P.T. = POINT OF TANGENCY
P.V.M.T. = PAVEMENT
(R) = RADIAL
R. = RADIUS
RGE. = RANGE
R.P.B. = ROAD PLAT BOOK
R.P.Z. = REDUCED PRESSURE ZONE
RW. = RIGHT OF WAY
(S) = SURVEY DATUM
S.B. = SETBACK
SEC. = SECTION
S/D. = SUBDIVISION
S.F. = SQUARE FEET
S.F.W.M.D. = SOUTH FLORIDA WATER MANAGEMENT DISTRICT
S.I.R.W.C.D. = SOUTH INDIAN RIVER WATER CONTROL DISTRICT
S.R. = STATE ROAD
STA. = STATION
STY. = STORY
SW. = SIDEWALK
T.O.B. = TOP OF BANK
T.O.C. = TOP OF CURB
T.O.W. = TOP OF WALL
TWP. = TOWNSHIP
TYP. = TYPICAL
UC. = UNDER CONSTRUCTION
U.E. = UTILITY EASEMENT
U.R. = UNRECORDED
W.C. = WITNESS CORNER
W.M.E. = WATER MANAGEMENT EASEMENT
W.M.M.E. = WATER MANAGEMENT MAINTENANCE EASEMENT
W.M.T. = WATER MANAGEMENT TRACT
YD. = YARD DRAIN
B. = BASELINE
C. = CENTERLINE
Δ. = CENTRAL ANGLE/DELTA
■. = CONCRETE MONUMENT FOUND (AS NOTED)
□. = CONCRETE MONUMENT SET (LB #4569)
●. = ROD & CAP FOUND (AS NOTED)
○. = 5/8" IRON ROD & CAP SET (LB #4569)
⊙. = IRON PIPE FOUND (AS NOTED)
●. = IRON ROD FOUND (AS NOTED)
●. = NAIL FOUND (AS NOTED)
●. = NAIL & DISK FOUND (AS NOTED)
●. = MAG NAIL & DISK SET (LB #4569)
P. = PROPERTY LINE
P. = UTILITY POLE
H. = FIRE HYDRANT
M. = WATER METER
V. = WATER VALVE
X. = LIGHT POLE

ALTA/NSPS Land Title Survey For:
FLORIDA REALTY, LLC, A DELAWARE
LIMITED LIABILITY COMPANY

This survey is made specifically and only for the following parties for the purpose of a closing on the surveyed property.

Florida Realty, LLC, a Delaware limited liability company
First American Title Insurance Company
Ronald Kochman, as Trustee of The 2000 S. Ocean Trust dated March 1, 2021
Kochman & Ziska, PLC

No responsibility or liability is assumed by the undersigned surveyor for any other purpose or to any other party other than stated above.

PROPERTY ADDRESS:
2000 S. Ocean Blvd & S. Ocean Blvd
Manalapan, FL 33462

LEGAL DESCRIPTION:
PARCEL 1: Located at 2000 S Ocean Boulevard (PCN#42-43-45-10-01-000-0032)

The South 1117.22 feet of the North 3437.02 feet of Government Lots One and Four, Section 15, Township 45 South, Range 43 East, the same consisting of Lot 3, less the North 150 feet thereof, all of Lot 4, and the North 70 feet of Lot 5, as shown and designated on "Commissioners" Map, Gedney vs. Pierson Partition, Chancery No. 8802," dated February 22, 1932, prepared by Fugate & Brockway, Engineers, on file in the Office of the Clerk of Circuit Court in and for Palm Beach County, Florida, in Chancery Case Number 8802, and the Northerly 70 feet of the Southerly 210 feet of Lot 5, as shown and designated on Commissioners' Map, Gedney vs. Pierson Partition, Chancery No. 8802, dated February 22, 1932, and the Southerly 20 feet of the Northerly 90 feet of Lot 5, as shown and designated on Commissioners' Map, Gedney vs. Pierson Partition, Chancery No. 8802, dated February 22, 1932, excepting from said parcels, the right of way of Ocean Boulevard as now located and in use.

PARCEL 2: Located at S Ocean Boulevard (PCN#42-43-45-10-01-000-0067)

COMMENCING at a point where the Northerly boundary line of the South 310 feet of Lot 6 as shown on "Commissioners' Map, Gedney vs. Pierson Partition, Chancery 8802", dated February 22, 1932, prepared by Fugate & Brockway, Engineers, on file in the office of the Clerk of the Circuit Court in and for Palm Beach County, Florida, in Chancery Case Number 8802, meets the mean high-water mark of Lake Worth; thence Westerly on a line parallel to the North boundary line of the right-of-way of the South Lake Worth Inlet District, a distance of 1300 feet; thence in a Southerly direction parallel to the centerline of the Intracoastal Waterway 310 feet to the North boundary line of the right-of-way of the South Lake Worth Inlet District; thence Easterly along said North boundary line 1200 feet to the mean high-water mark of Lake Worth; thence Northerly along said mean high water mark 310 feet, more or less, to the Point of Beginning. Containing 12.1 acres, more or less, lying and being in Section 15, Township 45 South, Range 43 East, Palm Beach County, Florida.

LESS: All that portion of the above-described Parcel 2 lying East of a line parallel to and 513 feet Westerly from (Measured at right angles) the centerline of State Road No. A-1-A (Ocean Boulevard).

FLOOD ZONE: This property is located in Flood Zones AE (EL 6), X, VE (EL 10 & 12), according to F.I.R.M. (Flood Insurance Rate Map) No. 12099C 0791F, dated 10/05/2017.

ALTERNATE LEGAL DESCRIPTION FOR PARCEL 1 WRITTEN BY SURVEYOR:
PARCEL 1: Located at 2000 S Ocean Boulevard (PCN#42-43-45-10-01-000-0032)

A parcel of land lying in Government Lots One and Four, Section 15, Township 45 South, Range 43 East, the same consisting of a portion of Lots 3, 4 and 5, as shown and designated on "Commissioners" Map, Gedney vs. Pierson Partition, Chancery No. 8802," dated February 22, 1932, prepared by Fugate & Brockway, Engineers, on file in the Office of the Clerk of Circuit Court in and for Palm Beach County, Florida, in Chancery Case Number 8802, being more particularly described as follows:

BEGIN at the point of intersection of the South line of the North 150 feet of said Lot 3 with the mean high water line on the East shore of the Lake Worth Lagoon;
thence South 89°36'39" East, along said South line (the North line of said Lot 3 is assumed to bear South 89°36'39" East and all other bearings are relative thereto), a distance of 481 feet, more or less, to the mean high water line of the Atlantic Ocean;
thence Southerly, along said mean high water line, a distance of 1208 feet, more or less, to the intersection with the South line of the North 160 feet of said Lot 5;
thence North 89°36'39" West, along said South line, a distance of 848 feet, more or less, to said Lake Worth Lagoon mean high water line;
thence Northerly, along said mean high water line, a distance of 1297', more or less, to said South line of the North 150 feet of Lot 3 and the POINT OF BEGINNING.
LESS and EXCEPT the right of way of South Ocean Boulevard as now located and in use.

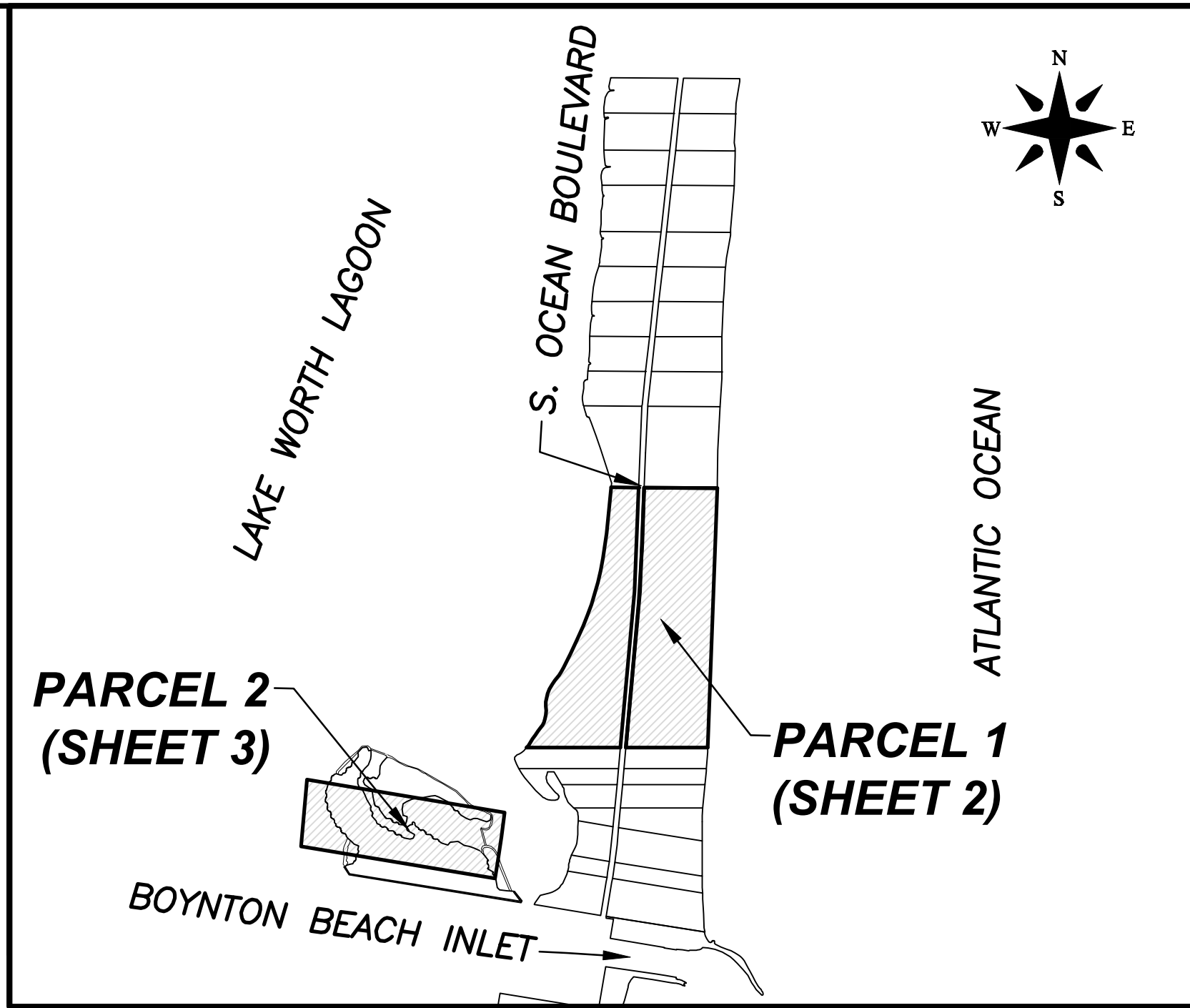
CERTIFICATION:
I HEREBY ATTEST that the survey shown hereon conforms to the Standards of Practice set forth by the Florida Board of Professional Surveyors and Mappers adopted in Rule 5J-17, Florida Administrative Code pursuant to Section 472.027, Florida Statutes, effective September 1, 1981.

To: Florida Realty, LLC, a Delaware limited liability company
First American Title Insurance Company
Ronald Kochman, as Trustee of The 2000 S. Ocean Trust dated March 1, 2021
Kochman & Ziska, PLC

This is to certify that this map or plat and the survey on which it is based were made in accordance with the 2021 Minimum Standard Detail Requirements for ALTA/NSPS Land Title Surveys, jointly established and adopted by ALTA and NSPS, and includes Table A Items 1, 2, 3, 4, 6(a)(b), 7(b)(1), 7(c), 8, 9, 11(a), 13, 14, 16, 17 and 18 thereof. The field work was completed on December 27, 2023.

DATE OF LAST FIELD SURVEY: 12/27/2023

Craig L. Wallace
Professional Surveyor and Mapper
Florida Certificate No. 3357
cwallace@wallacesurveying.com
www.wallacesurveying.com



VICINITY SKETCH
(NOT TO SCALE)

NOTES:

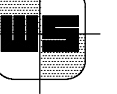
- All information regarding record easements, adjoiners, and other documents that might affect the quality of title to tract shown hereon was gained from commitment number 1062-6015835, issued by First American Title Insurance Company, dated April 20, 2022. This office has made no search of the Public Records.
- Elevations shown hereon, if any, are in feet and decimal parts thereof and are based on NAVD-88. The expected accuracy of the elevations shown hereon is 0.03' for the hard surface elevations and 0.1' for the soft surface elevations. Elevations shown hereon are U.S. survey feet unless otherwise noted.
- Description furnished by client or client's agent.
- Unless it bears the signature and the original raised seal of a Florida licensed surveyor or mapper this drawing, sketch, plat or map is for informational purposes only and is not valid.
- This survey cannot be transferred or assigned without the specific written permission of Wallace Surveying Corporation. This survey is not transferable by Owners Affidavit of Survey or similar instrument.
- Except as shown, underground and overhead improvements are not located. Underground foundations not located.
- The survey sketch shown hereon does not necessarily contain all of the information obtained or developed by the undersigned surveyor in his field work, office work or research.
- No responsibility is assumed by this surveyor for the construction of improvements, from building ties shown on this survey.
- Revisions shown hereon do not represent a "survey update" unless otherwise noted.
- All dates shown within the revisions block hereon are for interoffice filing use only and in no way affect the date of the field survey stated herein.
- In some instances, graphic representations have been exaggerated to more clearly illustrate the relationships between physical improvements and/or lot lines. In all cases, dimensions shown shall control the location of the improvements over scaled positions.
- It is a violation of Rule 5J-17 of the Florida Administrative Code to alter this survey without the express prior written consent of the Surveyor. Additions and/or deletions made to the face of this survey will make this survey invalid.
- The ownership of fences, perimeter walls and/or hedges shown hereon are not known and thus are not listed as encroachments. Fences, hedges and/or perimeter walls are shown in their relative position to the boundary.
- The expected horizontal accuracy of the information shown hereon is +/- 0.10'.
- Per Florida Statutes, Chapter 472.025, a Land Surveyor shall not affix his seal or name to any plan or drawing which depicts work which he/she is not licensed to perform or which is beyond his/her profession or specialty therein. Therefore, we are unable to certify as to municipal zoning compliance, interpretation of zoning codes or the determination of violations thereof.
- At the time of the ALTA survey there were no observable evidence of earth moving work, building construction or building additions within recent months.
- At the time of the ALTA survey there were no changes in street right-of-way lines either completed or proposed; and available from the controlling jurisdiction or observable evidence of recent street or sidewalk construction repairs.
- At the time of the ALTA survey there was no observable evidence of site use as a solid waste dump, dump or sanitary landfill.
- The surveyor was not provided any documentation, was not made aware and did not observe any ground markings on the subject property with regards to wetlands on the subject property.
- The location of the utilities shown hereon are from observed evidence of above ground appurtenances only. The surveyor was not provided with current underground plans or surface ground markings to determine the location of any subterranean uses.
- No stripped parking spaces on the surveyed property.

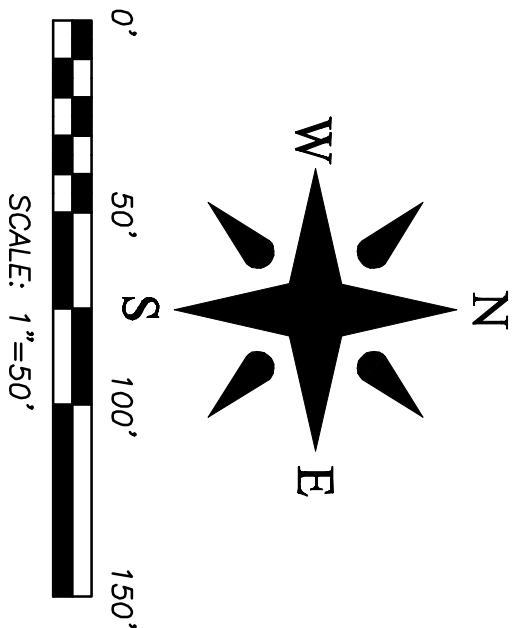
REVISIONS:

12/27/23 SURVEY & TIE-IN UPDATE WITH SPOT ELEVATIONS (SPECIAL ALTA CONDITIONS NOT UPDATED) B.M./S.W. 17-1234.23 PB357/36
05/19/22 ALTA SURVEY & TIE-IN UPDATE B.M./S.W. 17-1234.19 LW144/16
02/09/22 PLOT 2.0 NAVD CONTOUR LINE J.D./J.P. 17-1234.17 LW143/62
05/11/21 SURVEY & TIE-IN UPDATE J.O./S.W. 17-1234.15 LW140/71
01/11/21 SPOT ELEVATIONS J.O./S.W. 17-1234.14 LW141/11

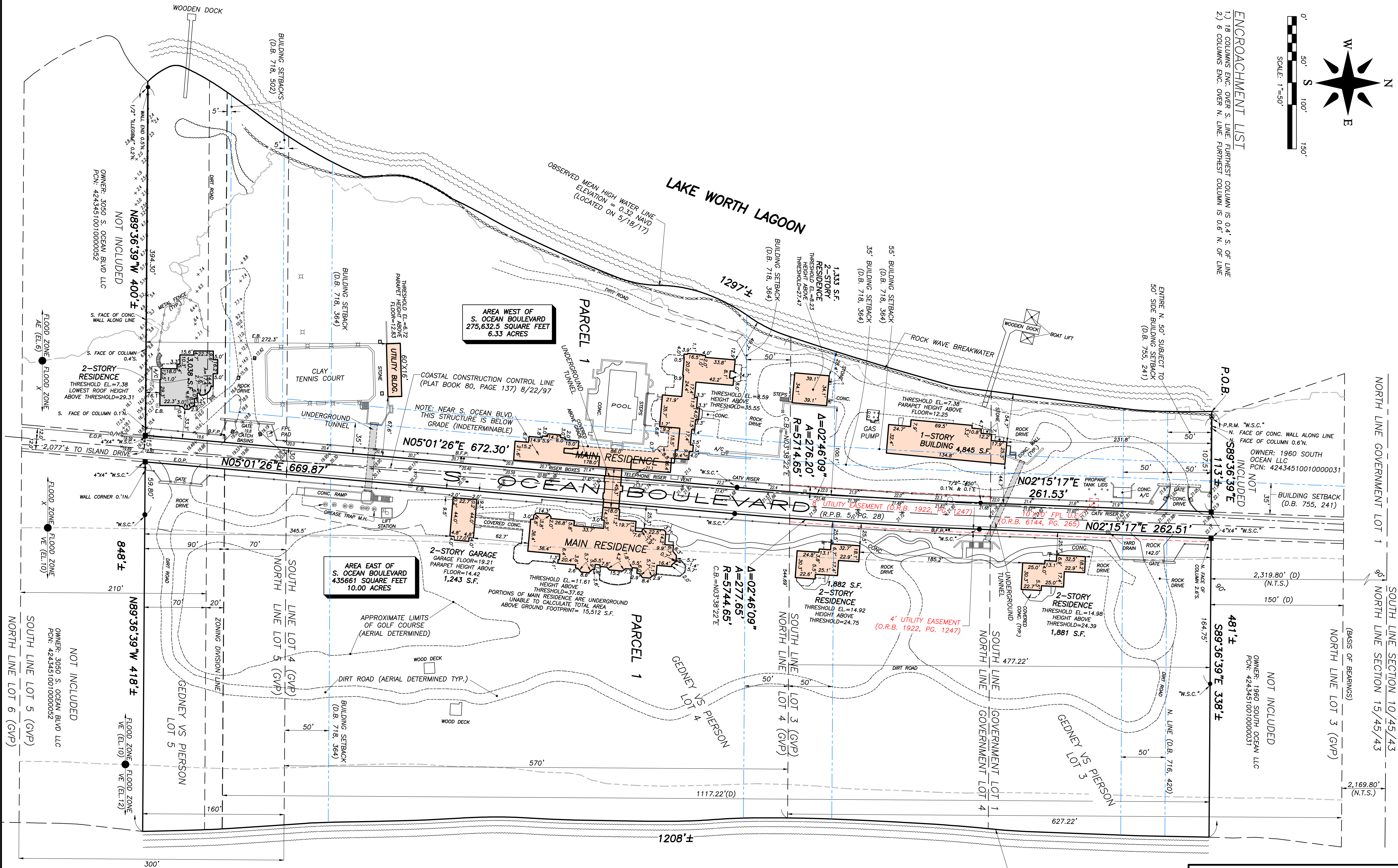
ALTA/NSPS Land Title Survey For:

FLORIDA REALTY, LLC, A DELAWARE
LIMITED LIABILITY COMPANY

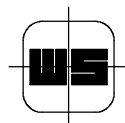
 WALLACE SURVEYING CORP. LICENSED BUSINESS # 4569 5553 VILLAGE BOULEVARD, WEST PALM BEACH, FLORIDA 33407 • (561) 640-4551			
FIELD:	B.M.	JOB NO.: 17-1234.7	F.B. PB240 PG. 64
OFFICE:	S.W.	DATE: 09/04/2019	DWG. NO. 17-1234-3
C/K'D:	C.W.	REF: 17-1234.DWG	SHEET 1 OF 3



ENCROACHMENT LIST
1.) 18 COLUMNS ENC. OVER S. LINE. FURTHEST COLUMN IS 0.4' S. OF LINE
2.) 6 COLUMNS ENC. OVER N. LINE. FURTHEST COLUMN IS 0.6' N. OF LINE

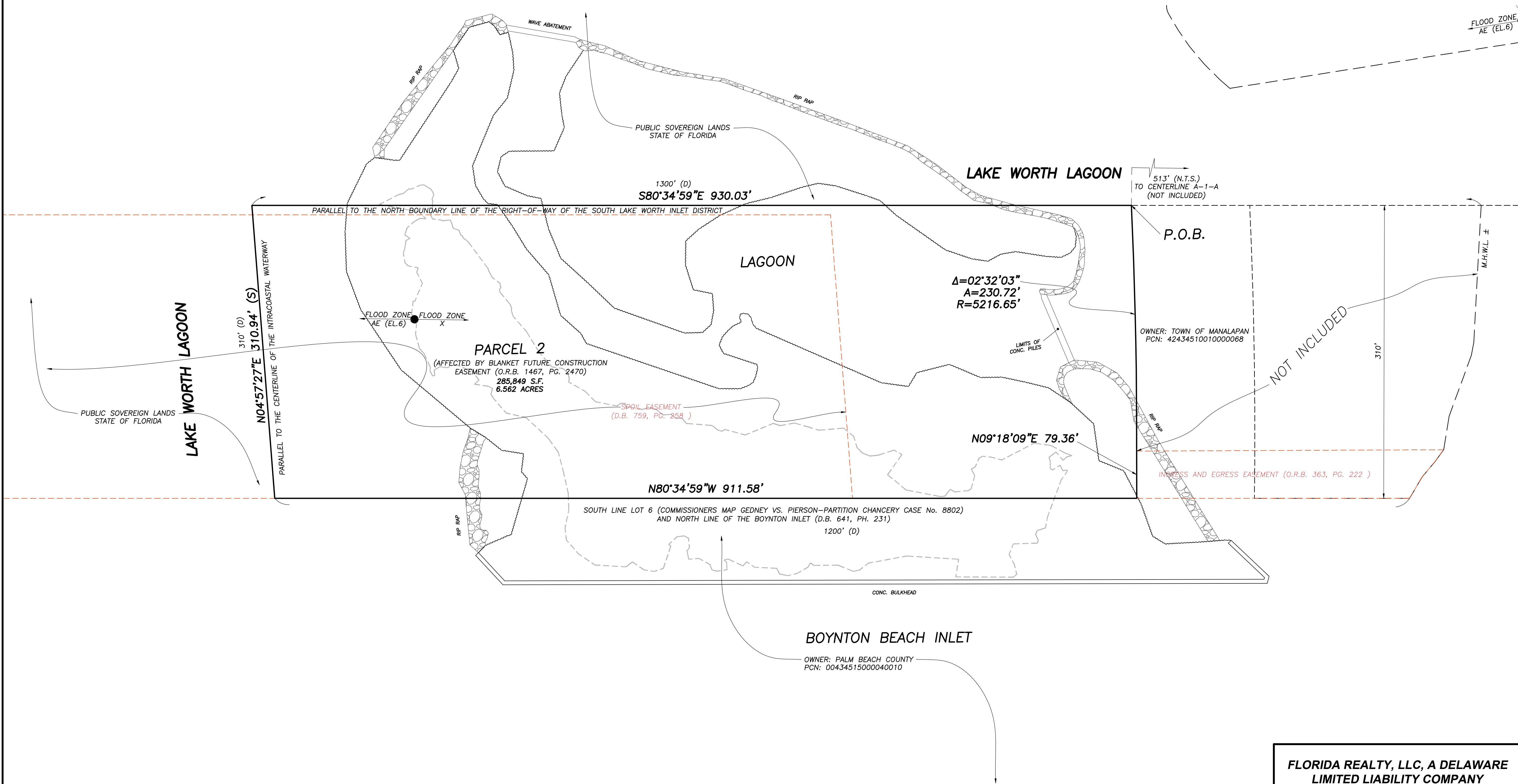
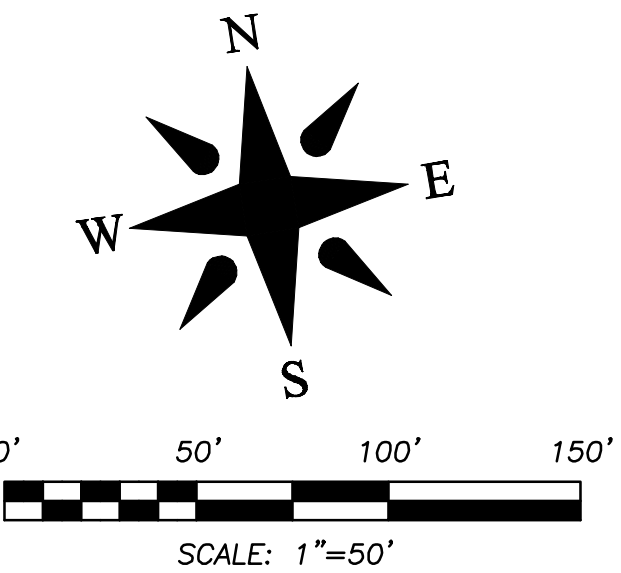


FLORIDA REALTY, LLC, A DELAWARE
LIMITED LIABILITY COMPANY

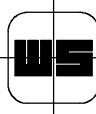


WALLACE SURVEYING
CORP., LICENSED BUSINESS # 4061
5553 VILLAGE BOULEVARD, WEST PALM BEACH, FLORIDA 33407 * (561) 640-4551

FIELD: B.M.	JOB NO.: 17-1234.7	F.B. PB240 PG. 64
OFFICE: S.W.	DATE: 09/04/2019	DWG. NO. 17-1234-3
C/K'D: C.W.	REF: 17-1234.DWG	SHEET 2 OF 3



FLORIDA REALTY, LLC, A DELAWARE
LIMITED LIABILITY COMPANY

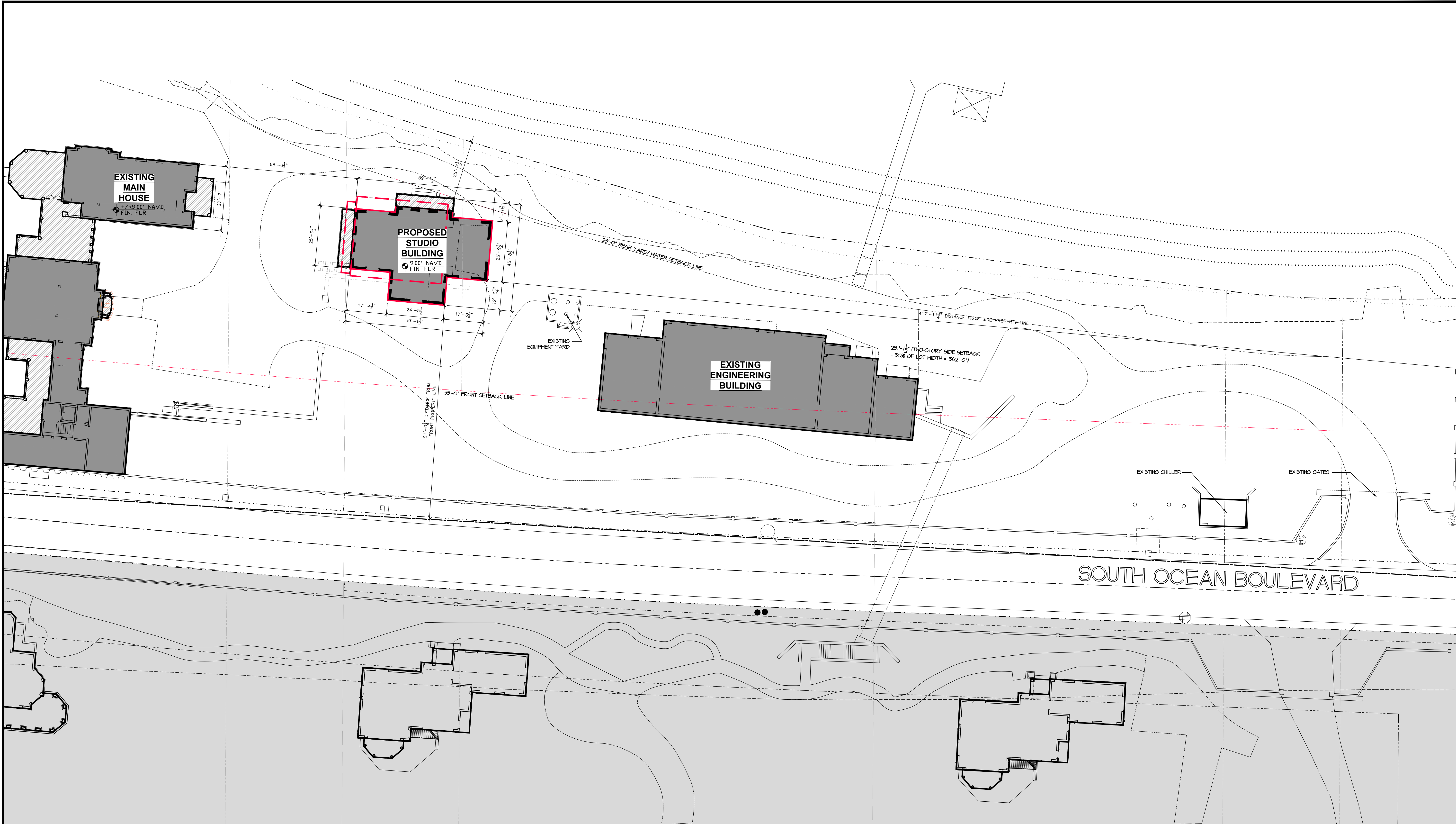
 **WALLACE SURVEYING**
CORP., LICENSED BUSINESS # 4069

5553 VILLAGE BOULEVARD, WEST PALM BEACH, FLORIDA 33407 * (561) 640-4551

FIELD:	B.M.	JOB NO.:	17-1234.7	F.B.	PB240 PG. 64
OFFICE:	S.W.	DATE:	09/04/2019	DWG. NO.	17-1234-3
C/K'D:	C.W.	REF:	17-1234.DWG	SHEET	3 OF 3



PROPOSED ADDITIONS AND RENOVATIONS AT:	
<h1 style="margin: 0;">2000 SOUTH OCEAN BOULEVARD</h1>	
MANALAPAN	PALM BEACH COUNTY, FLORIDA
<div style="display: flex; align-items: center; justify-content: center;"> <div> <h2 style="margin: 0;">DAILEY JANSSEN ARCHITECTS</h2> <p style="margin: 0; font-size: 0.8em;">400 CLEMATIS STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33401, TEL: 561-933-4707, LICENSE #AA-C0001974</p> </div> </div>	
DATE: 11-06-2023	
DRAWN:	
REVISIONS:	
<ul style="list-style-type: none"> 02.26.24 TOWN SUBMITTAL 04.11.24 REV 01 	
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SEAL	
ROGER P. JANSSEN	AR-14785
DRAWING NO.	
<h1 style="margin: 0;">SP1.01</h1>	
JOB NUMBER:	22-130



STUDIO BUILDING SITE PLAN

SCALE 1" = 20'-0"

PROPOSED ADDITIONS AND RENOVATIONS AT:

2000 SOUTH OCEAN BOULEVARD

PALM BEACH COUNTY, FLORIDA

DAILEY JANSSEN ARCHITECTS

MANUAL APAN 400 CLEVELAND STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33401, TEL: 561-933-4101, LICENSE #AA-C0014

DATE: 11-06-2023

DRAWN:

REVISIONS:

• 01.12.24

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SEAL

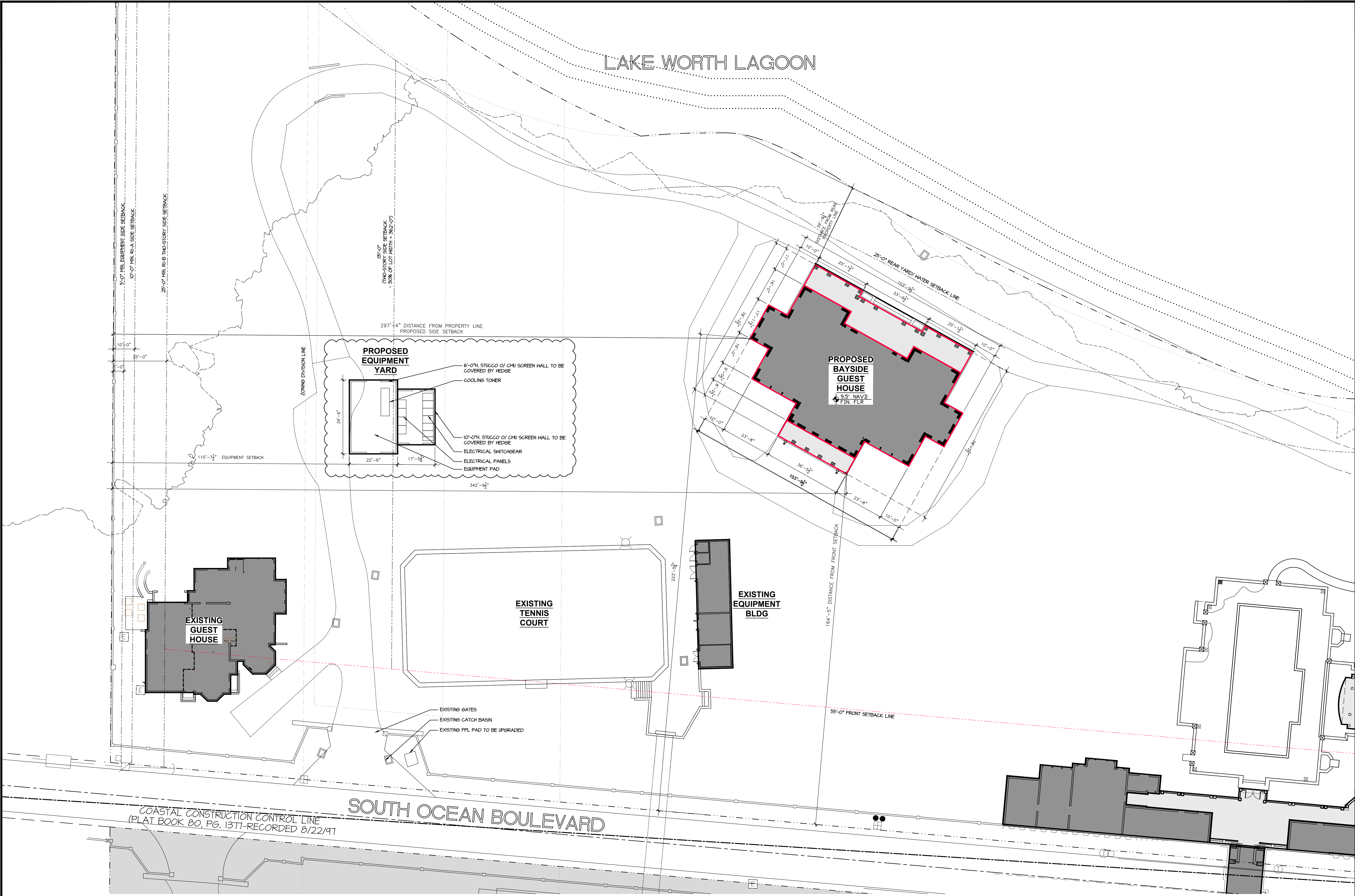
ROGER P. JANSSEN AR-14105

DRAWING NO.

SH
SP1.02

JOB NUMBER:

22-136



BAYSIDE GUEST HOUSE SITE PLAN

SCALE 1" = 20'-0"

PROPOSED ADDITIONS AND RENOVATIONS AT:

2000 SOUTH OCEAN BOULEVARD

PALM BEACH COUNTY, FLORIDA

DAILEY JANSSEN ARCHITECTS

400 CLEVELAND STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33401 TEL: 561-933-4107, LICENSE #AA-C001914

DATE: 11-06-2023

DRAWN:

REVISIONS:

- 02.08.24 SD SUBMITTAL
- 04.11.24 REV 01

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SEAL

ROGER P. JANSSEN

AR-14105

DRAWING NO.

GH
SP1.03

JOB NUMBER:

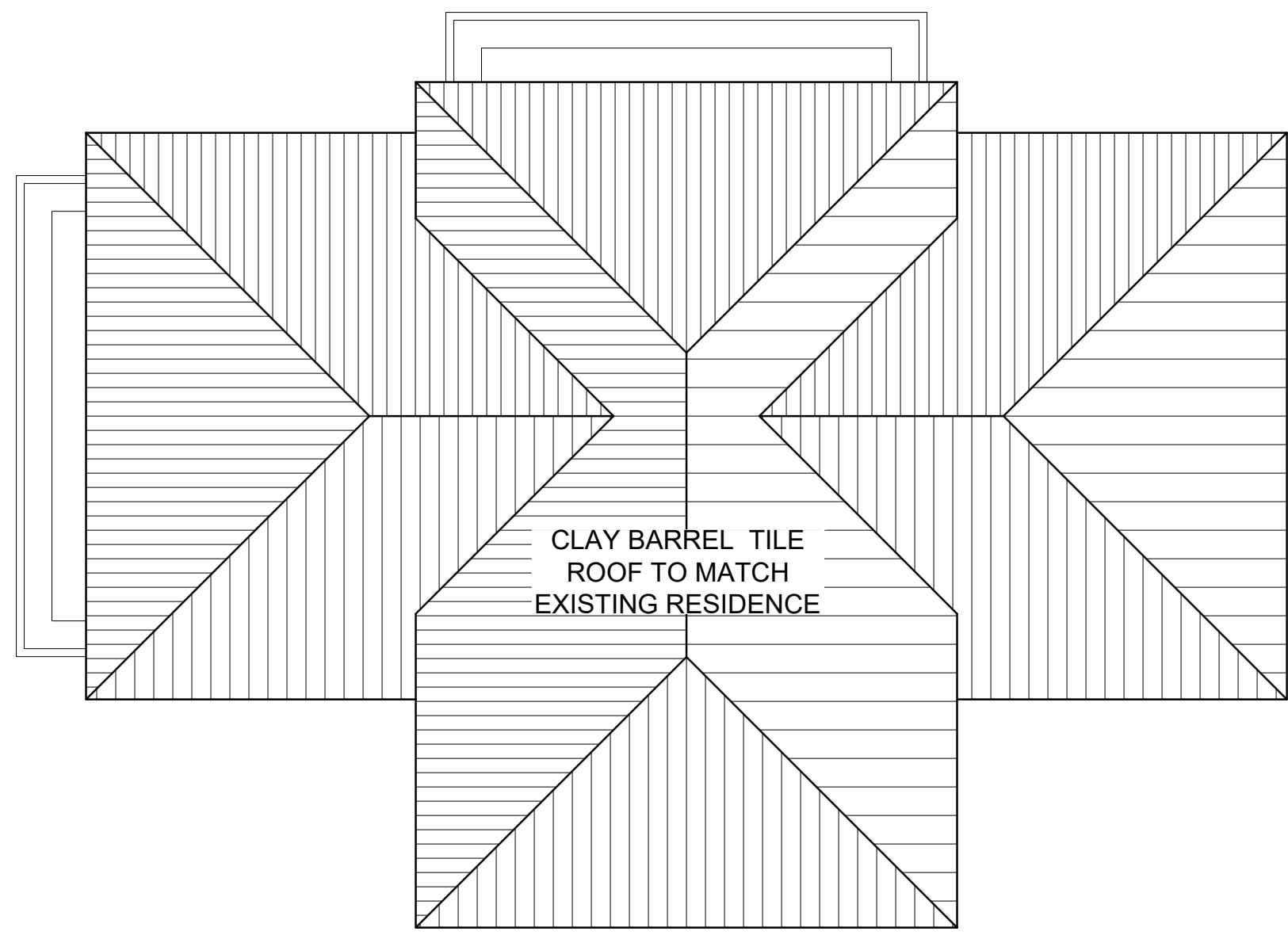
22-138



↑
PROPOSED
STUDIO

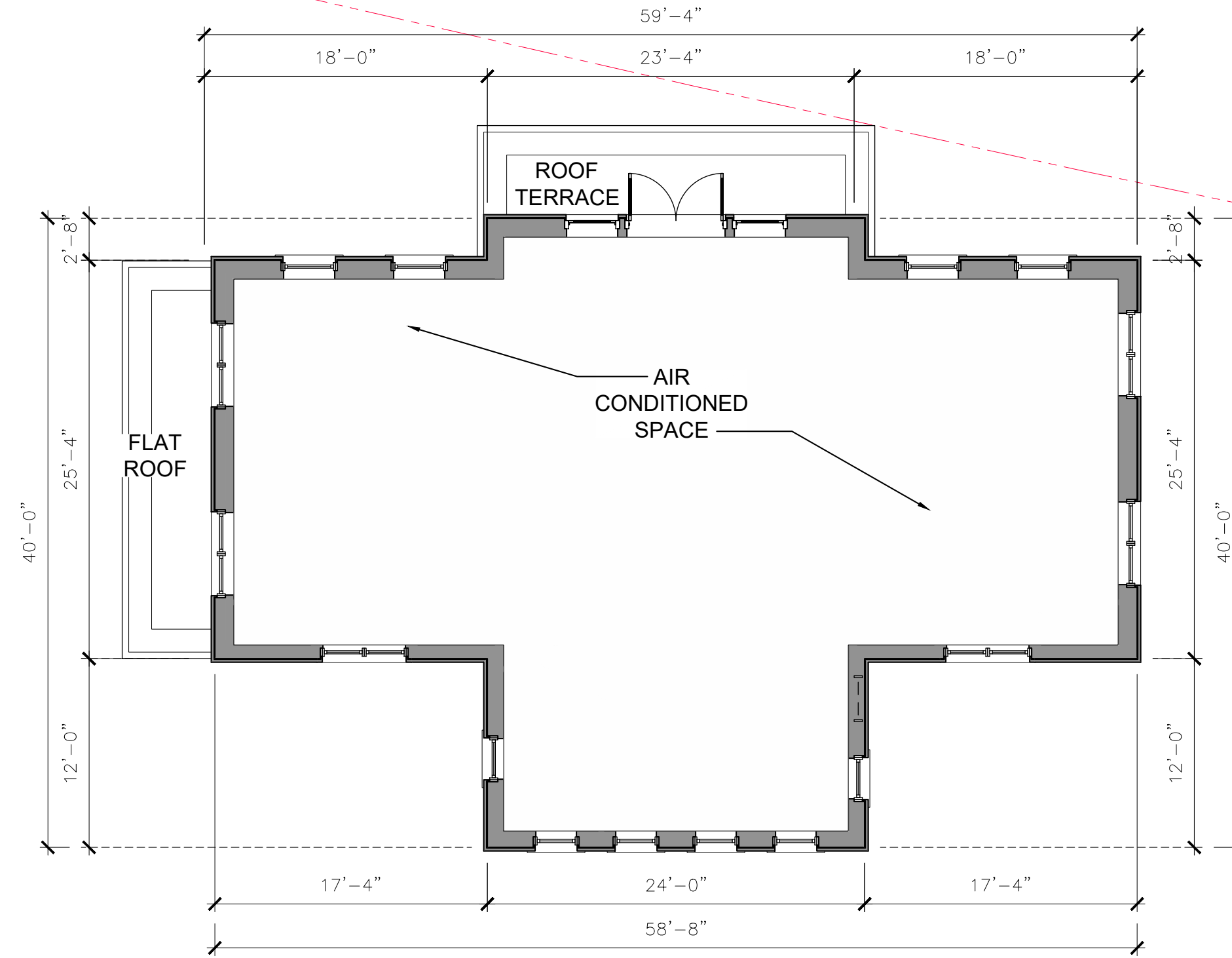
↑
EXISTING
MAIN HOUSE

↑
PROPOSED
GUEST HOUSE



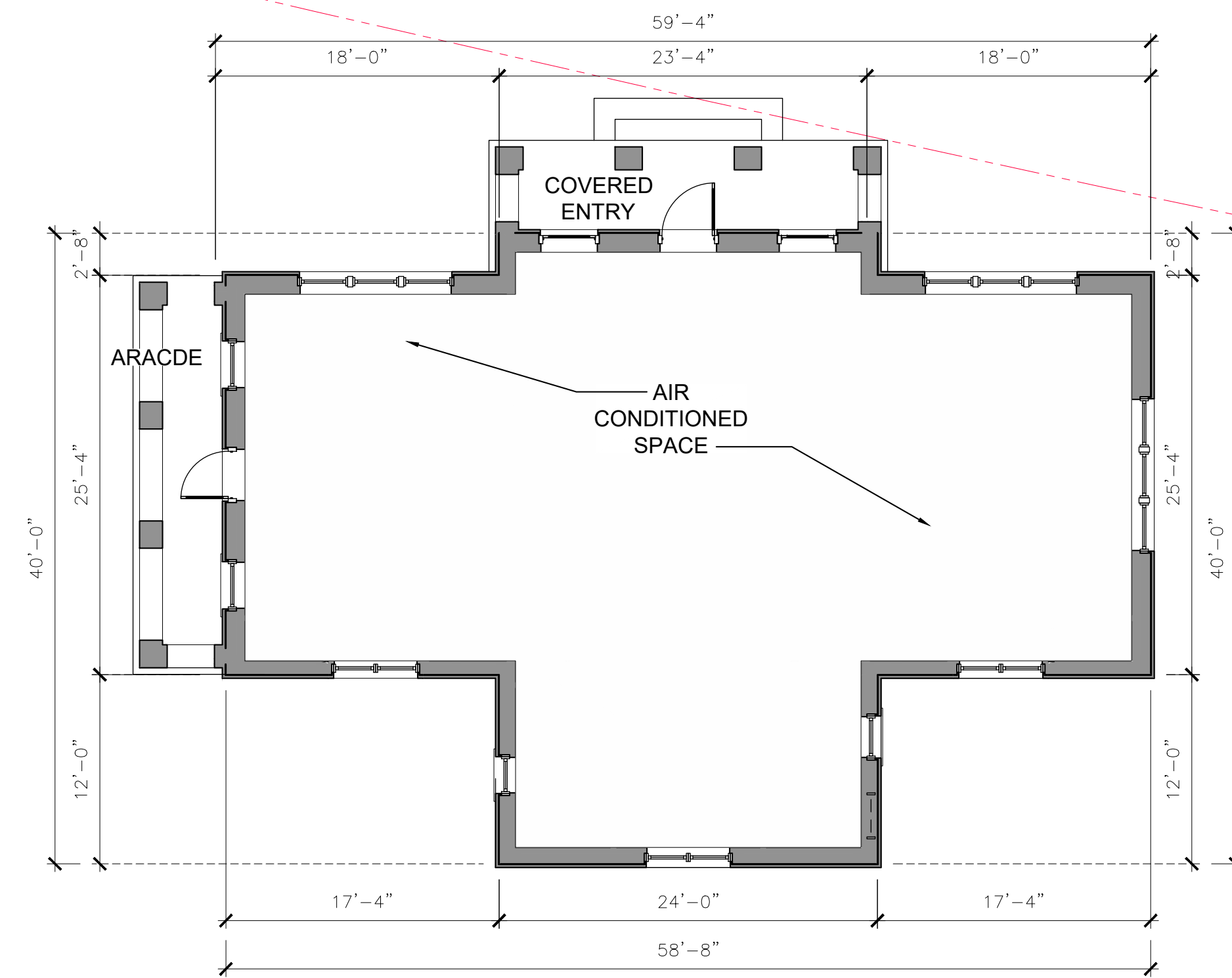
STUDIO BLDG
ROOF PLAN

SCALE 1/8" = 1'-0"



STUDIO BLDG
2ND FLOOR PLAN

SCALE 1/8" = 1'-0"



STUDIO BLDG
1ST FLOOR PLAN

SCALE 1/8" = 1'-0"

PROPOSED ADDITIONS AND RENOVATIONS AT:

2000 SOUTH OCEAN BOULEVARD

PALM BEACH COUNTY, FLORIDA

DAILEY JANSSEN ARCHITECTS

400 CLEVELAND STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33411 TEL: 561-933-4101, LICENSE #AA-C00174

DATE: 11-06-2023

DRAWN:

REVISIONS:

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ROGER P. JANSSEN AR-14105

DRAWING NO.

SH
A1.01

JOB NUMBER: 22-136

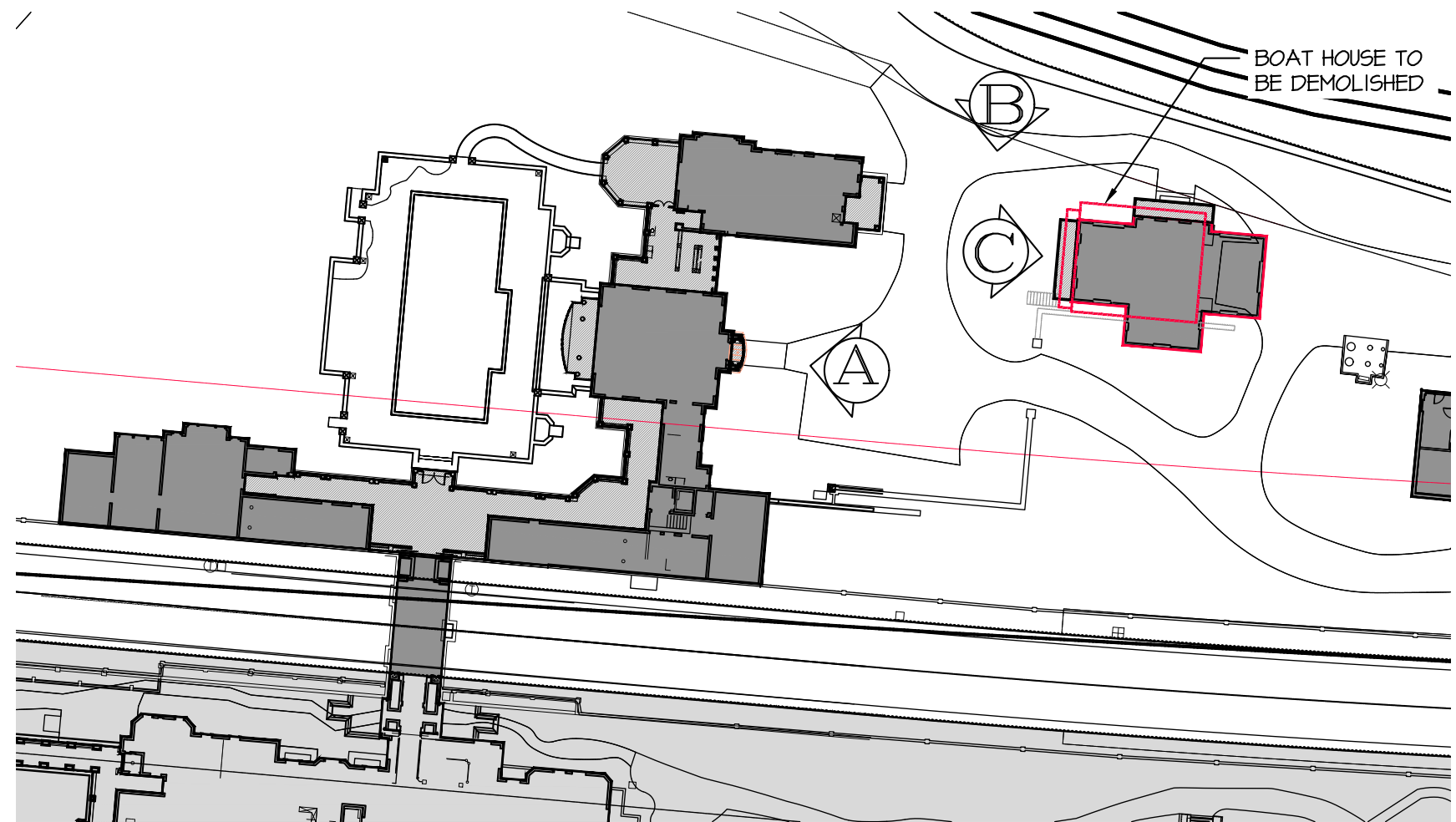


BOAT HOUSE (SOUTHWEST)

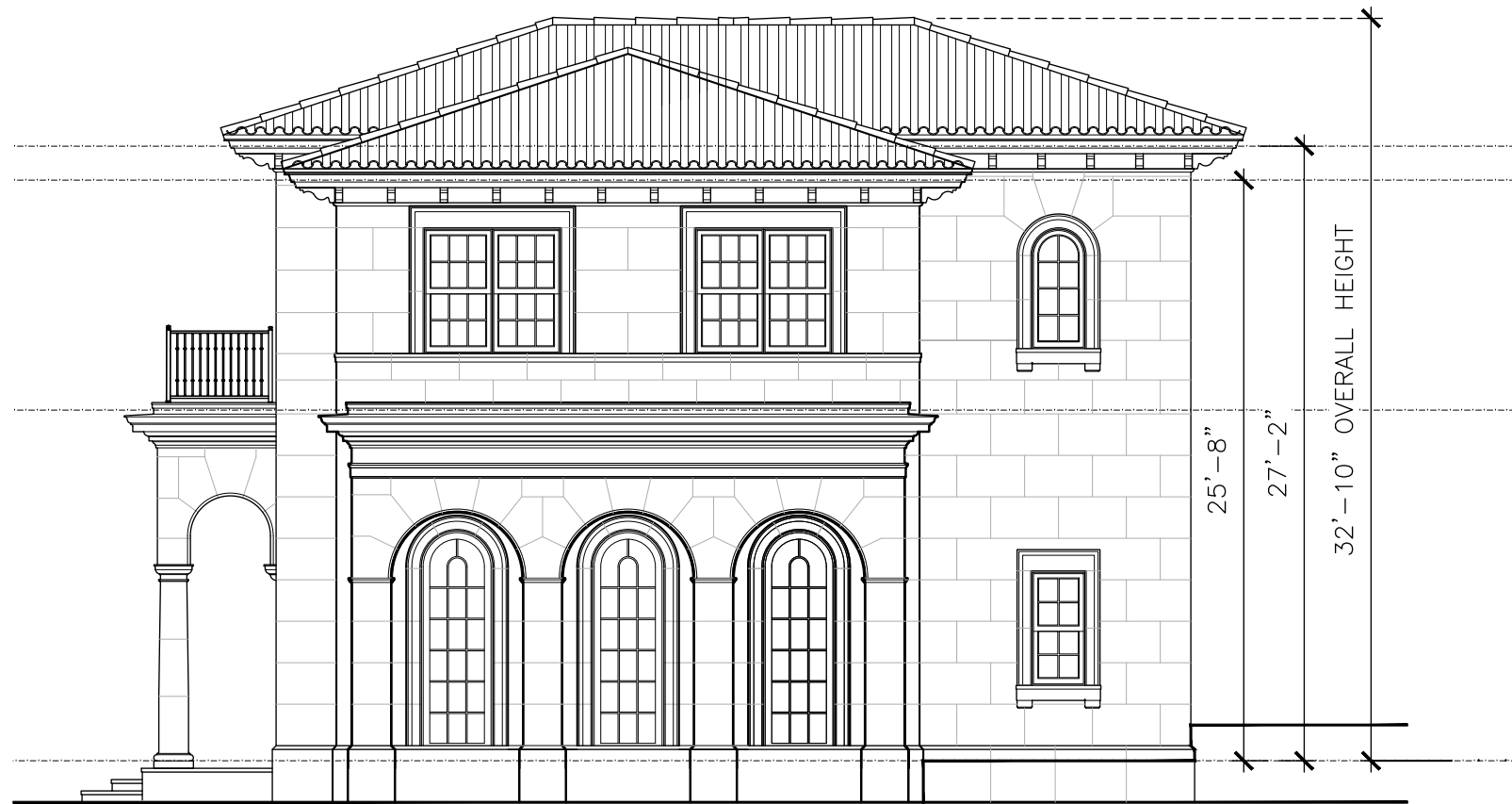


BOAT HOUSE (NORTH)

EXISTING BOAT HOUSE PHOTOGRAPHS
(TO BE DEMOLISHED)



LOCATION KEY



C. STUDIO BUILDING (PROPOSED)
SOUTH ELEVATION COMPARISON

SCALE 1/8" = 1'-0"



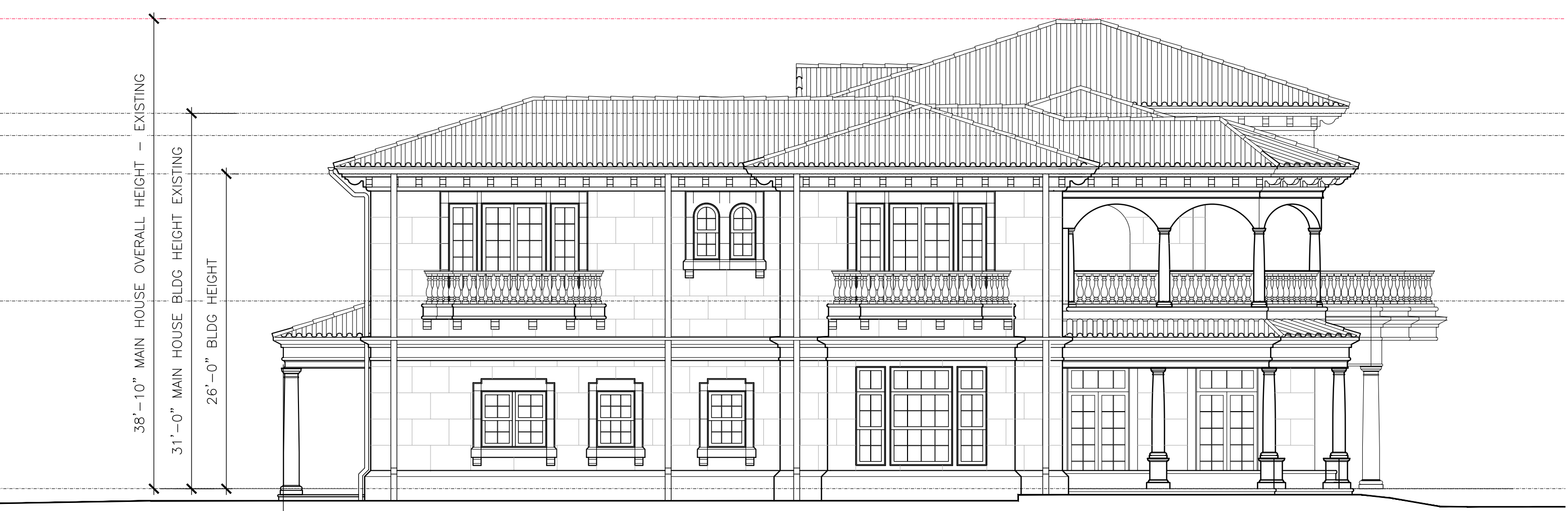
A. MAIN HOUSE (EXISTING)
— ENTRY/NORTH ELEVATION COMPARISON

SCALE 1/8" = 1'-0"



B. STUDIO BUILDING (PROPOSED) — MAIN HOUSE (EXISTING)
OVERALL WEST ELEVATION COMPARISON

55'-0 1/2" (GREATER THAN THE OVERALL HEIGHT OF EXISTING MAIN HOUSE)



SCALE 1/8" = 1'-0"

PROPOSED ADDITIONS AND RENOVATIONS AT:

2000 SOUTH OCEAN BOULEVARD

PALM BEACH COUNTY, FLORIDA

DAILEY JANSSEN ARCHITECTS

400 CLEVELAND STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33411 TEL: 561-933-4101, LICENSE #AA-C001914

DATE: 11-06-2023

DRAWN:

REVISIONS:

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SEAL

ROGER P. JANSSEN

AR-14105

DRAWING NO.

SH
A2.01

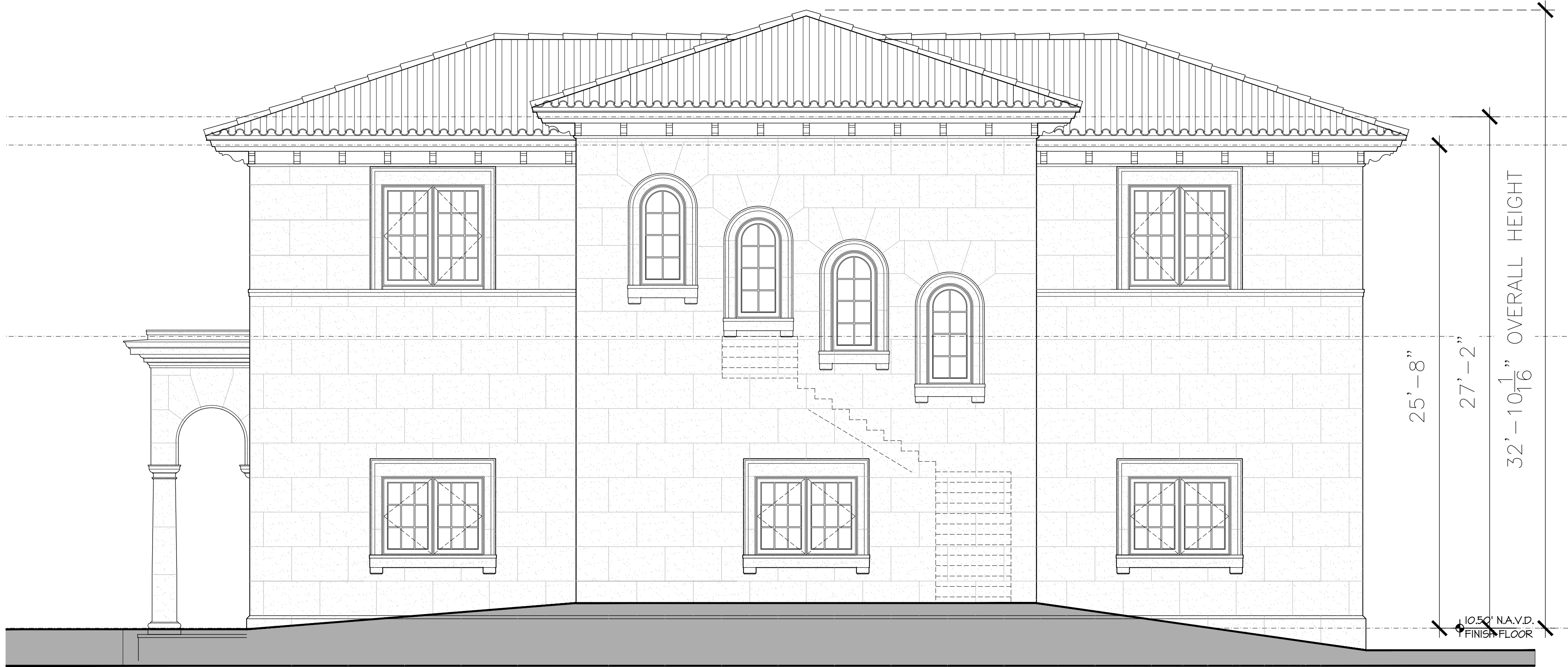
JOB NUMBER:

22-136



STUDIO BUILDING
ENTRY/ WEST ELEVATION

SCALE 1/4" = 1'-0"



STUDIO BUILDING
EAST ELEVATION

SCALE 1/4" = 1'-0"

- ELEVATION MATERIAL NOTES
- CLAY BARREL TILE ROOF
 - CORAL STONE VENEER @ WALLS
 - CORAL STONE TRIM AND COLUMNS
 - STAINED IMPACT RATED WOOD DOUBLE HUNG WINDOWS
 - STAINED IMPACT RATED WOOD FRENCH & SLIDING DOORS
 - BRONZE RAILINGS
 - STAINED WOOD SOFFIT, OUTRIGGERS, AND EXT. CEILINGES

PROPOSED ADDITIONS AND RENOVATIONS AT:

2000 SOUTH OCEAN BOULEVARD

PALM BEACH COUNTY, FLORIDA

DAILEY JANSSEN ARCHITECTS

400 CLEVELAND STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33401 TEL: 561-833-4101, LICENSE #AA-C0014

DATE: 11-06-2023

DRAWN:

REVISIONS:

- 02.24.24 SD SUBMITTAL
- 03.01.24 DD PROGRESS
- 04.15.24 15% DD SET

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SEAL

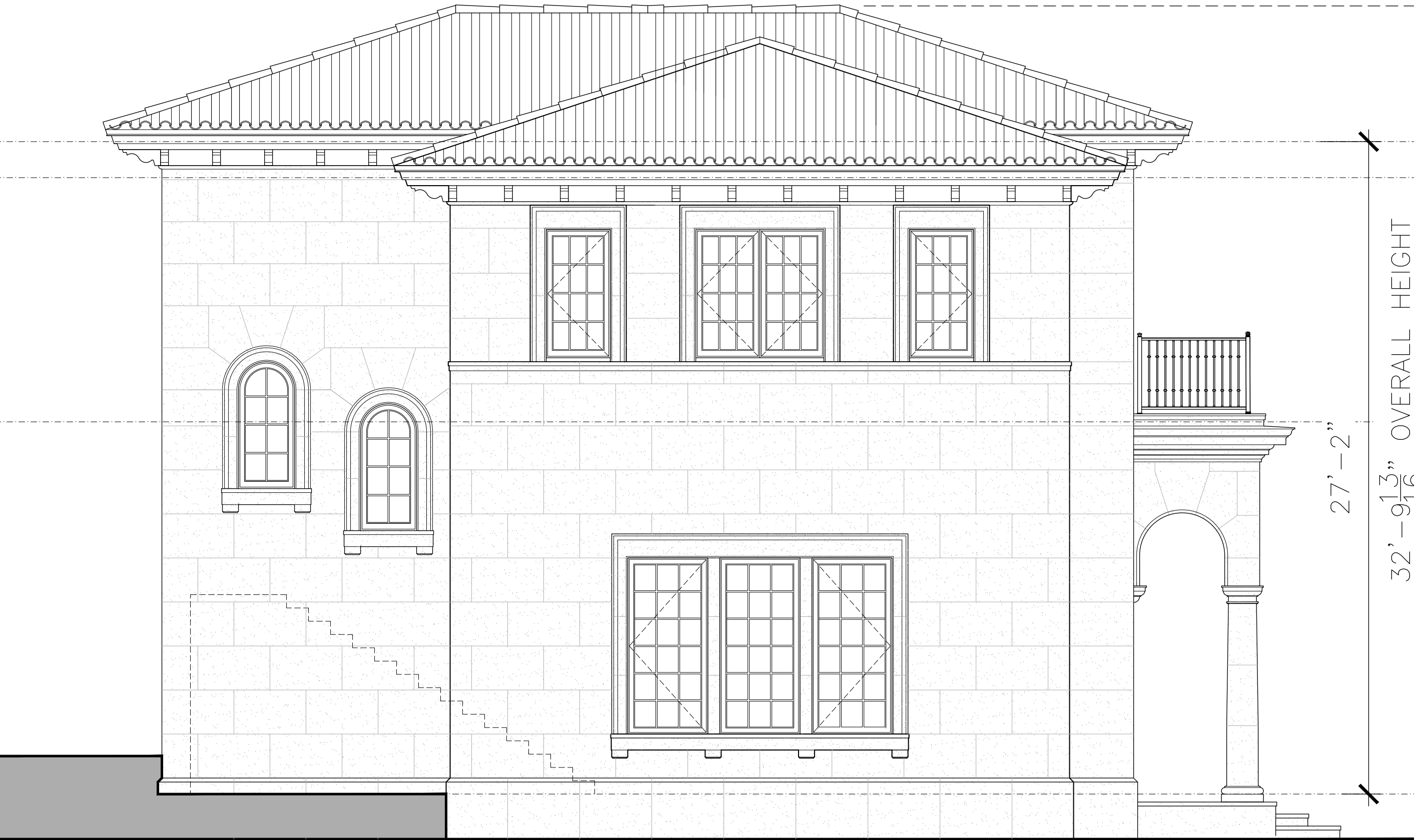
ROGER P. JANSSEN AR-14105

DRAWING NO.

SH
A2.02

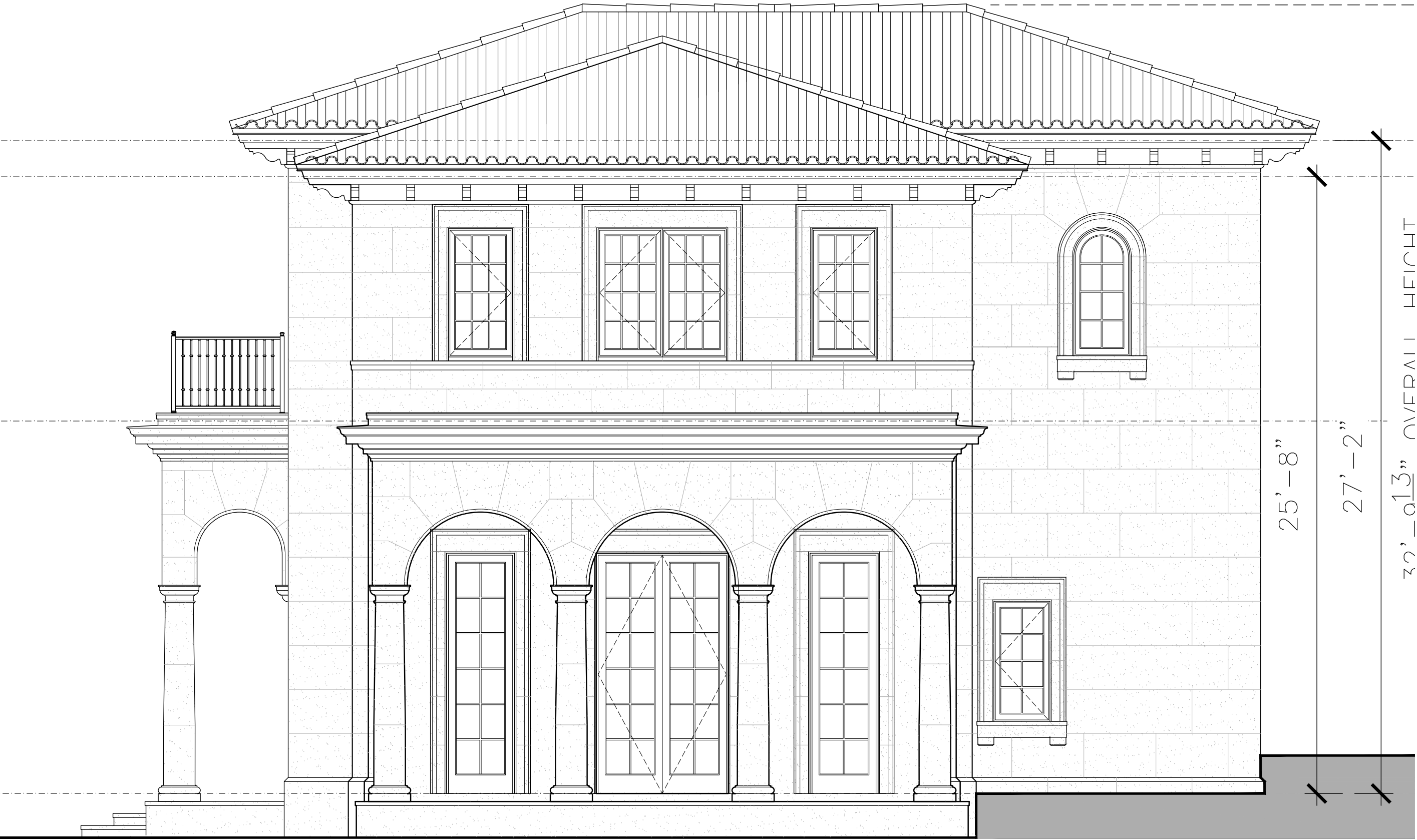
JOB NUMBER:

22-136



STUDIO BUILDING
NORTH ELEVATION

SCALE 1/8" = 1'-0"



STUDIO BUILDING
SOUTH ELEVATION

SCALE 1/8" = 1'-0"

ELEVATION MATERIAL NOTES

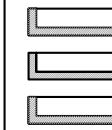
- CLAY BARREL TILE ROOF
- CORAL STONE VENEER @ WALLS
- CORAL STONE TRIM AND COLUMNS
- STAINED IMPACT RATED WOOD DOUBLE HUNG WINDOWS
- STAINED IMPACT RATED WOOD FRENCH & SLIDING DOORS
- BRONZE RAILINGS
- STAINED WOOD SOFFIT, OUTRIGGERS, AND EXT. CEILING

PROPOSED ADDITIONS AND RENOVATIONS AT:

2000 SOUTH OCEAN BOULEVARD

MANALAPAN

PALM BEACH COUNTY, FLORIDA



DAILEY JANSSEN ARCHITECTS

400 CLEVELAND STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33401 TEL: 561-933-4101, LICENSE #AA-C001914

DATE: 11-06-2023

DRAWN:

REVISIONS:

- 02.24.24 SD SUBMITTAL
- 03.01.24 DD PROGRESS
- 04.15.24 15% DD SET

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ROGER P. JANSSEN AR-14105

DRAWING NO.

SH
A2.02

JOB NUMBER:

22-136





DAILEY JANSSEN ARCHITECTS, P.A.
400 CLEMATIS STREET, STE 200 WEST PALM BEACH, FLORIDA 33401

2000 SOUTH OCEAN BLVD
03.15.24

PROPOSED STUDIO
VIEW FROM NORTHWEST P2



SOUTH ELEVATION



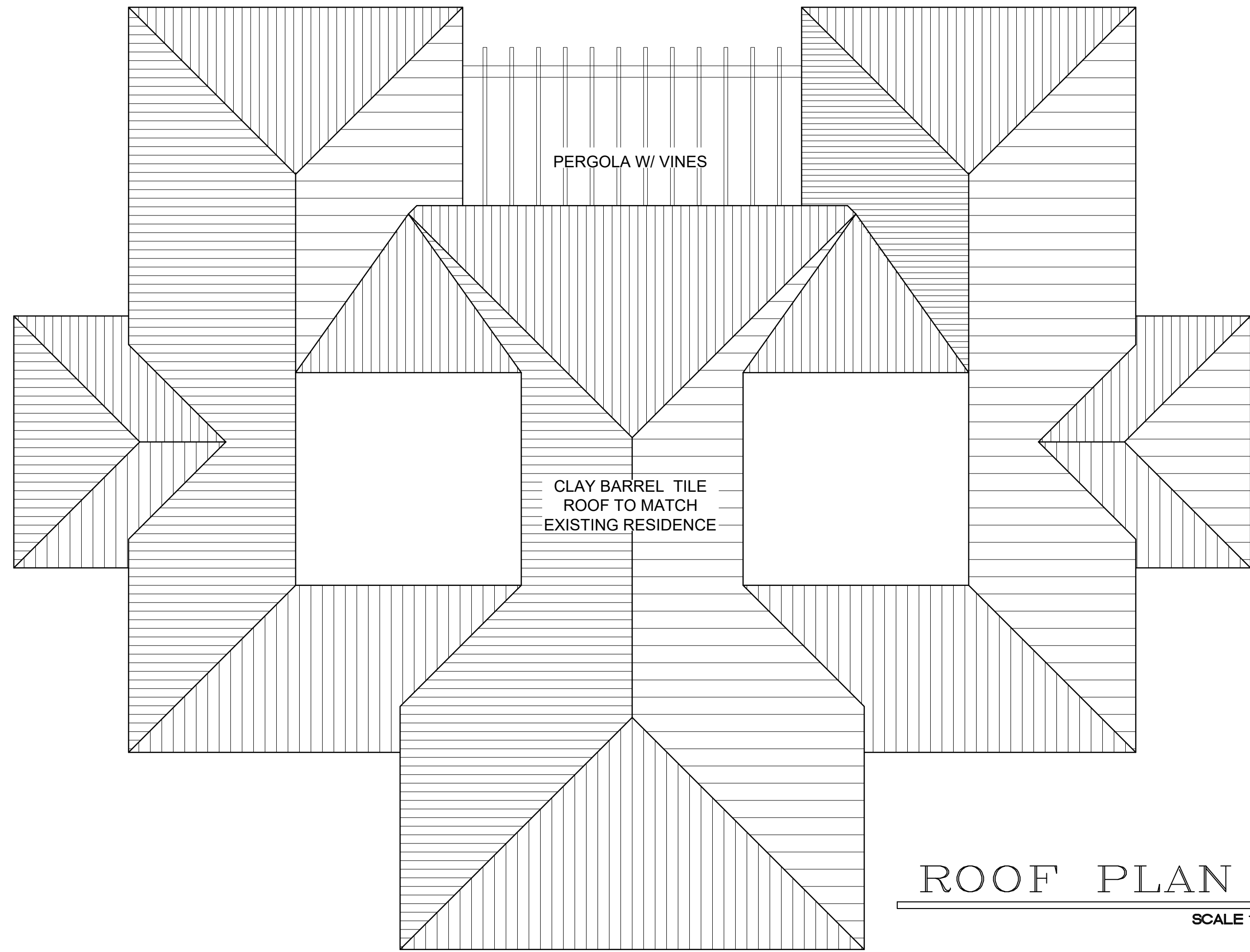
WEST ELEVATION



NORTH ELEVATION

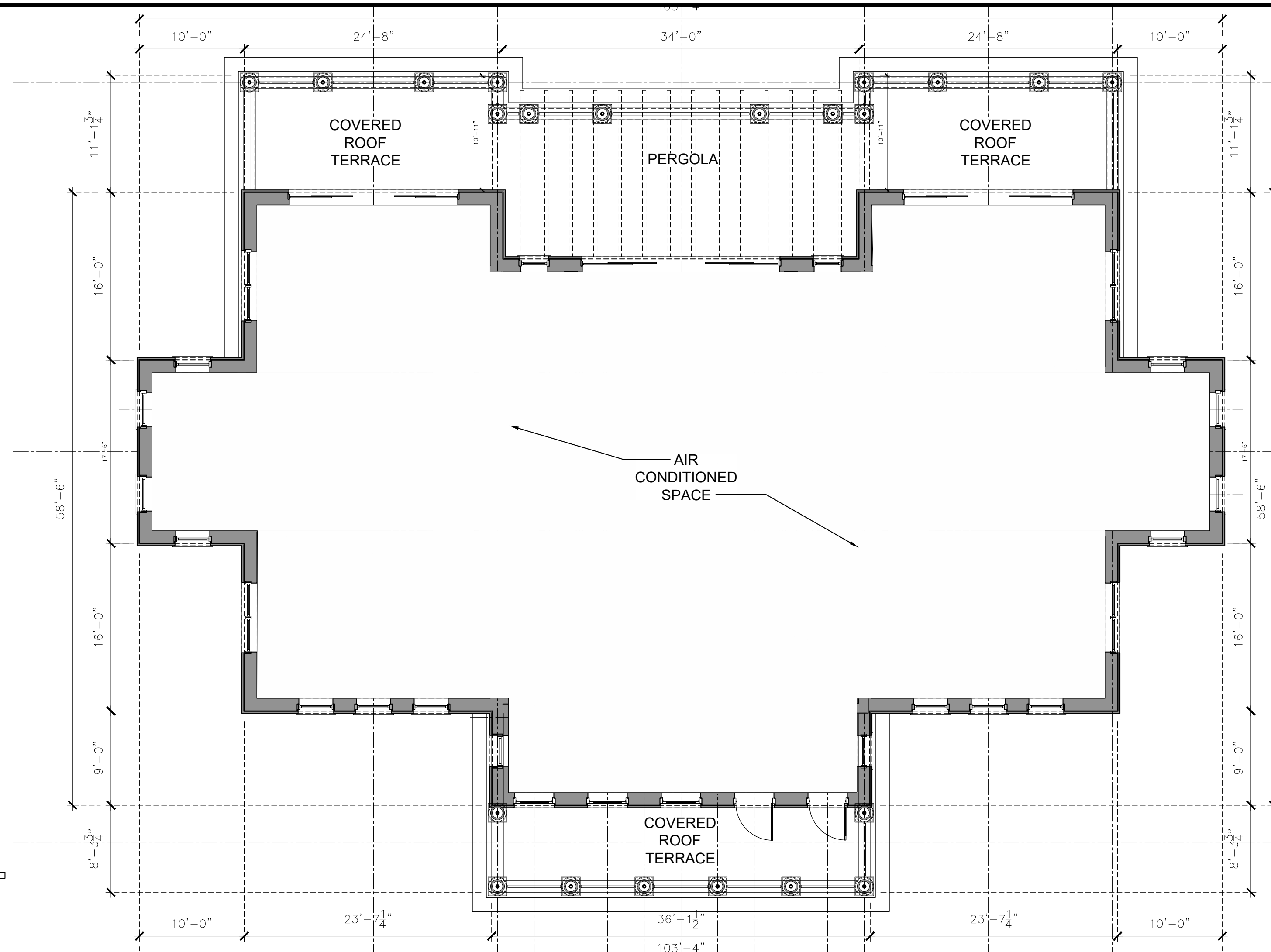


EAST ELEVATION



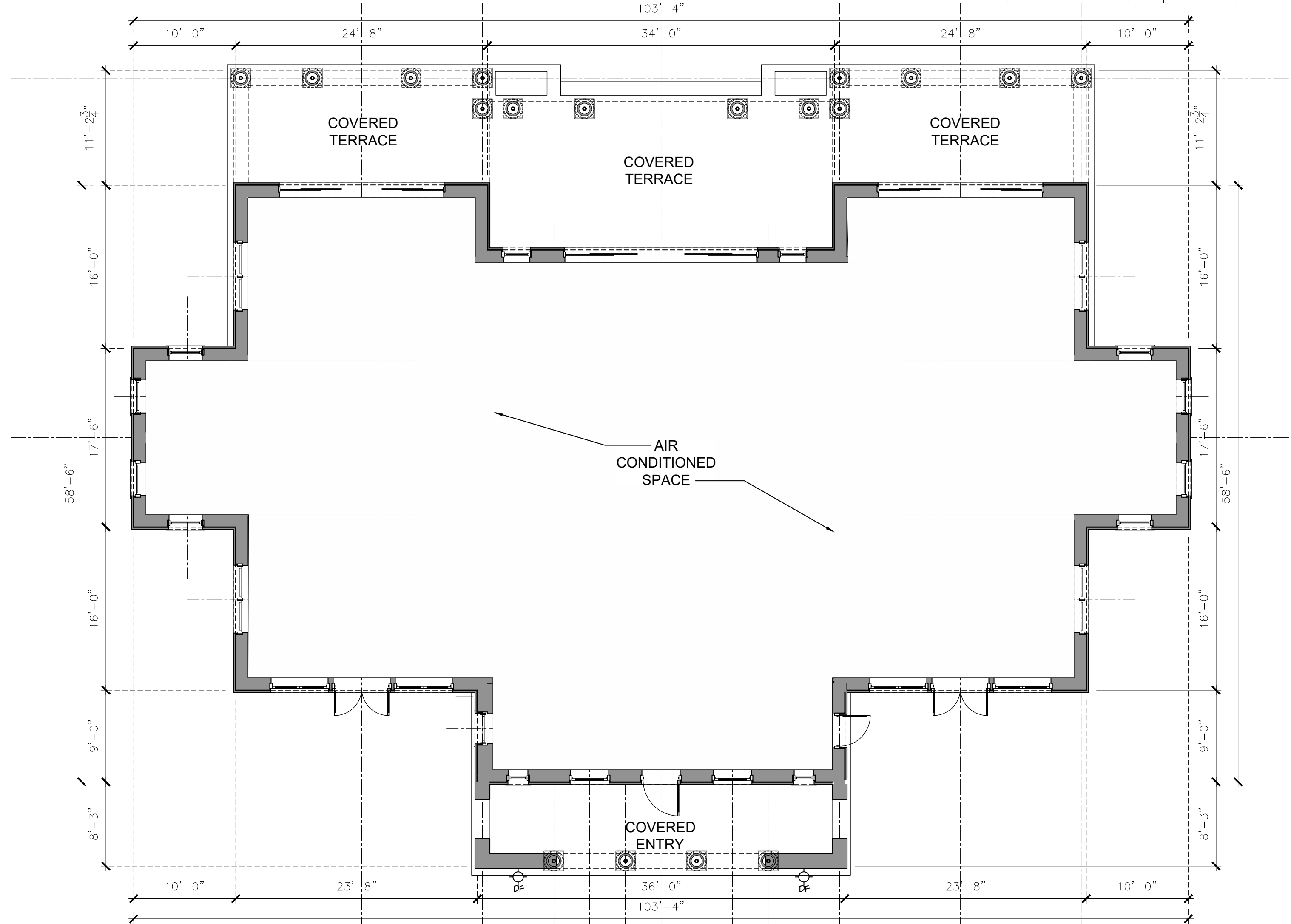
ROOF PLAN

SCALE 1/8" = 1'-0"



2ND FLOOR PLAN

SCALE 1/8" = 1'-0"



1ST FLOOR PLAN

SCALE 1/8" = 1'-0"

PROPOSED ADDITIONS AND RENOVATIONS AT:

2000 SOUTH OCEAN BOULEVARD

PALM BEACH COUNTY, FLORIDA

DAILEY JANSSEN ARCHITECTS

400 CLEVELAND STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33401 TEL: 561-933-4101, LICENSE WA-C0014

DATE: 11-06-2023

DRAWN:

REVISIONS:

• 02.01.24 SD SUBMITTAL

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SEAL

ROGER P. JANSSEN

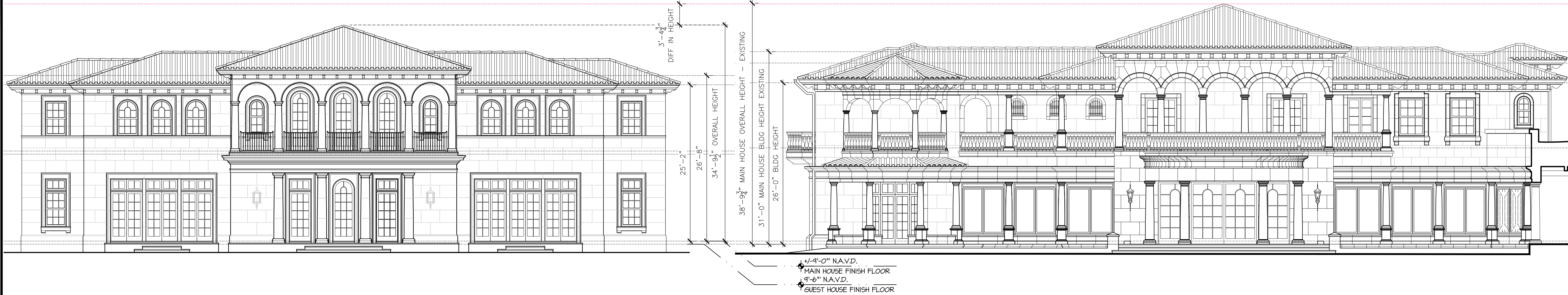
AR-14105

DRAWING NO.

GH
A1.01

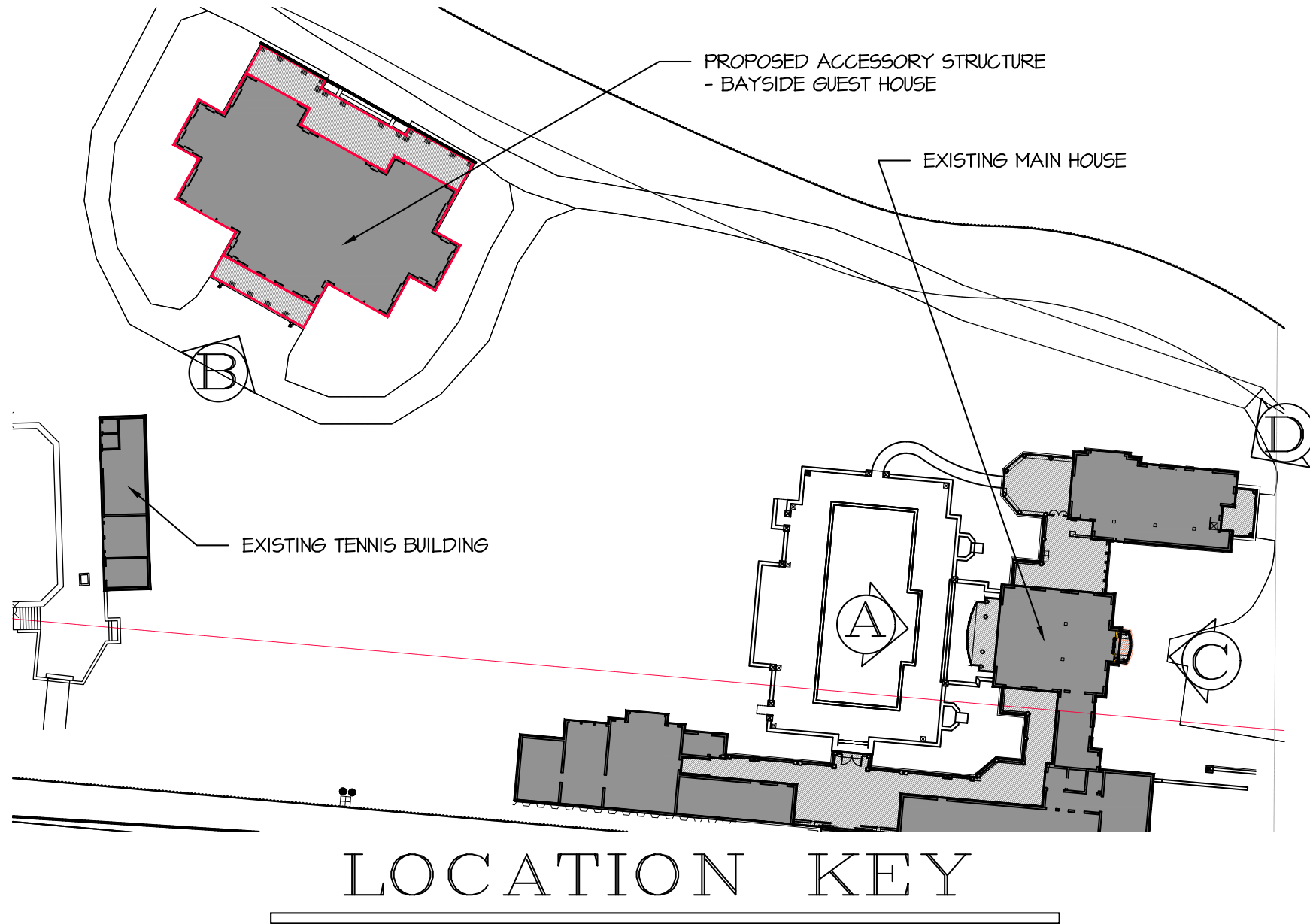
JOB NUMBER:

22-136



B. BAYSIDE GUEST HOUSE (PROPOSED)
ENTRY/ SOUTHEAST ELEVATION
SCALE 1/8" = 1'-0"

A. EXISTING MAIN HOUSE (PROPOSED)
SOUTH ELEVATION
SCALE 1/8" = 1'-0"



EXISTING MAIN HOUSE
PHOTOGRAPHS

PROPOSED ADDITIONS AND RENOVATIONS AT:

2000 SOUTH OCEAN BOULEVARD

PALM BEACH COUNTY, FLORIDA

DAILEY JANSSEN ARCHITECTS

400 CLEVELAND STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33411 TEL: 561-833-4101, LICENSE #AA-C00174

DATE: 11-06-2023

DRAWN:

REVISIONS:

• 02.08.24 SD SUBMITTAL

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SEAL

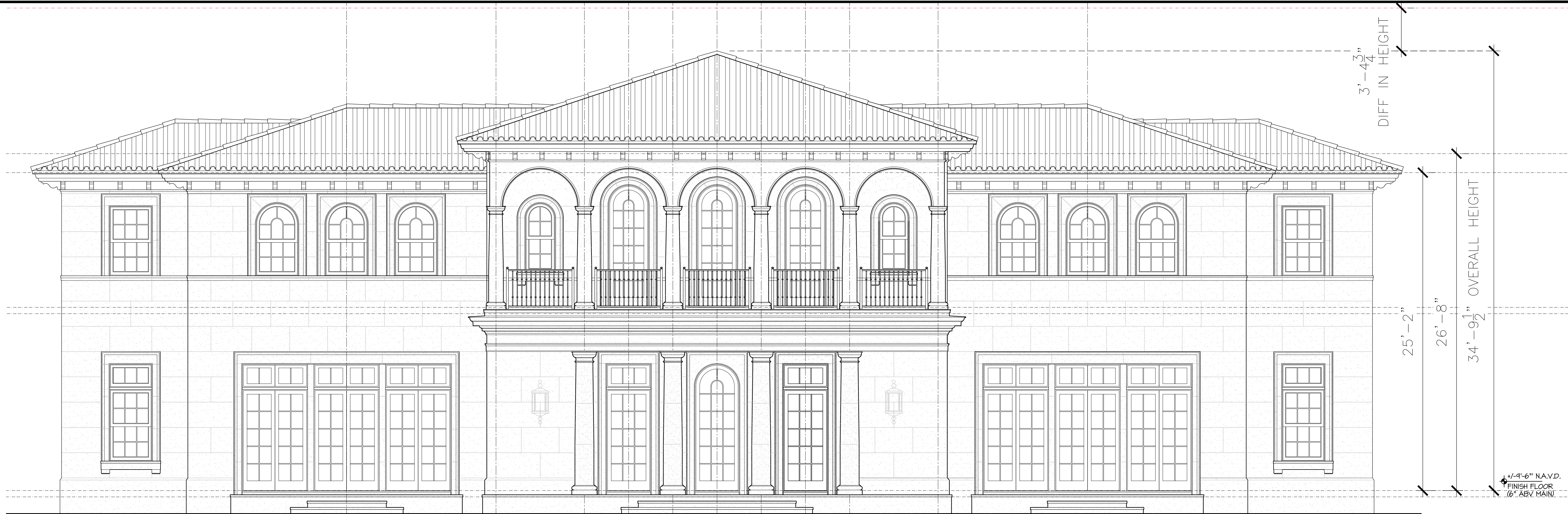
ROGER P. JANSSEN AR-14785

DRAWING NO.

GH

A2.01

JOB NUMBER: 22-138



BAYSIDE GUEST HOUSE
ENTRY/ SOUTHEAST ELEVATION

SCALE 1/4" = 1'-0"

ELEVATION MATERIAL NOTES

- CLAY BARREL TILE ROOF
- CORAL STONE VENEER @ WALLS
- CORAL STONE TRIM AND COLUMNS
- STAINED IMPACT RATED WOOD DOUBLE HUNG WINDOWS
- STAINED IMPACT RATED WOOD FRENCH & SLIDING DOORS
- BRONZE RAILINGS
- STAINED WOOD SOFFIT, OUTRIGGERS, AND EXT. CEILINGS



BAYSIDE GUEST HOUSE
SIDE/ NORTHEAST ELEVATION

SCALE 1/4" = 1'-0"

PROPOSED ADDITIONS AND RENOVATIONS AT:

2000 SOUTH OCEAN BOULEVARD

PALM BEACH COUNTY, FLORIDA

MANUAL APAN

DAILEY JANSSEN ARCHITECTS
400 CLEVELAND STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33411 TEL: 561-833-4101, LICENSE #AA-C001914

DATE: 11-06-2023

DRAWN:

REVISIONS:

• 02.08.24 SD SUBMITTAL

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SEAL

ROGER P. JANSSEN

AR-14785

DRAWING NO.

GH
A2.02

JOB NUMBER:

22-138



BAYSIDE GUEST HOUSE
WATER / NORTHWEST ELEVATION

SCALE 1/4" = 1'-0"

ELEVATION MATERIAL NOTES

- CLAY BARREL TILE ROOF
- CORAL STONE VENEER @ WALLS
- CORAL STONE TRIM AND COLUMNS
- STAINED IMPACT RATED WOOD DOUBLE HUNG WINDOWS
- STAINED IMPACT RATED WOOD FRENCH & SLIDING DOORS
- BRONZE RAILINGS
- STAINED WOOD SOFFIT, OUTRIGGERS, AND EXT. CEILINGS



BAYSIDE GUEST HOUSE
SIDE / SOUTHWEST ELEVATION

SCALE 1/4" = 1'-0"

PROPOSED ADDITIONS AND RENOVATIONS AT:

2000 SOUTH OCEAN BOULEVARD

PALM BEACH COUNTY, FLORIDA

DAILEY JANSSEN ARCHITECTS

400 CLEVELAND STREET, SUITE 200, WEST PALM BEACH, FLORIDA 33411 TEL: 561-833-4101, LICENSE #AA-C00174

DATE: 11-06-2023

DRAWN:

REVISIONS:

- 01.30.24 SD SUBMITTAL

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SEAL

ROGER P. JANSSEN AR-14705

DRAWING NO.

GH
A2.03

JOB NUMBER: 22-138



DAILEY JANSSEN ARCHITECTS, P.A.
400 CLEMATIS STREET, STE 200 WEST PALM BEACH, FLORIDA 33401

2000 SOUTH OCEAN BLVD
03.15.24

PROPOSED BAYSIDE GUEST HOUSE
VIEW FROM SOUTHEAST P1





EAST ELEVATION



WEST ELEVATION



SOUTH ELEVATION



NORTH ELEVATION



Private Residence 2000 South Ocean Blvd Manalapan

F L O R I D A

Sheet Index

Cover Sheet

L1.0 - Site Plan/Limit of Work

L2.0 - Guest House - Existing Conditions/Vegetation Action Plan

L2.1 - Guest House - Landscape Plan

L3.0 - Studio Building - Existing Conditions/Vegetation Action Plan

L3.1 - Studio Building - Landscape Plan

L4.0 - Equipment Yard

Design Team/Consultants

Landscape Architects

ENVIRONMENT DESIGN GROUP
139 NORTH COUNTY ROAD SUITE 20B
PALM BEACH, FL 33480
561.832.4600
WWW.ENVIRONMENTDESIGNGROUP.COM

Architects

DAILEY JANSSEN ARCHITECTS, P.A.
400 CLEMATIS STREET SUITE 200
WEST PALM BEACH, FL 33401
561.833.4707

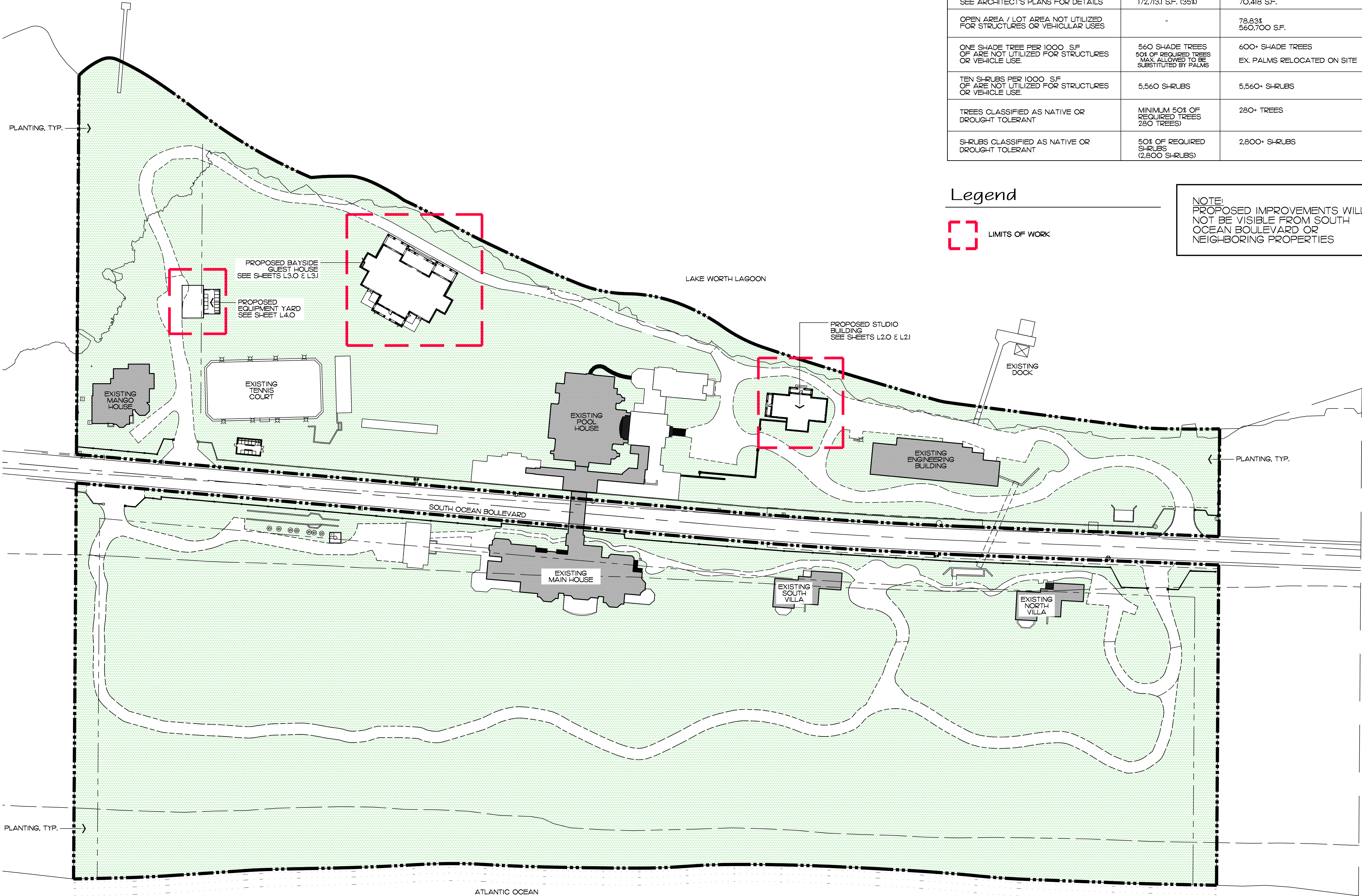
Landscape Requirements

LOT AREA	711,293.5 S.F. (100%)	
DESCRIPTION	REQUIRED	PROPOSED
BUILDING FOOTPRINT LOT COVERAGE SEE ARCHITECT'S PLANS FOR DETAILS	35% MAXIMUM 172,713.1 S.F. (35%)	14,27% 70,418 S.F.
OPEN AREA / LOT AREA NOT UTILIZED FOR STRUCTURES OR VEHICULAR USES	-	78.63% 560,700 S.F.
ONE SHADE TREE PER 1000 S.F. OF ARE NOT UTILIZED FOR STRUCTURES OR VEHICLE USE.	560 SHADE TREES 50% OF REQUIRED TREES MAX. ALLOWED TO BE SUBSTITUTED BY PALMS	600+ SHADE TREES EX. PALMS RELOCATED ON SITE
TEN SHRUBS PER 1000 S.F. OF ARE NOT UTILIZED FOR STRUCTURES OR VEHICLE USE.	5,560 SHRUBS	5,560+ SHRUBS
TREES CLASSIFIED AS NATIVE OR DROUGHT TOLERANT	MINIMUM 50% OF REQUIRED TREES 280 TREES	280+ TREES
SHRUBS CLASSIFIED AS NATIVE OR DROUGHT TOLERANT	50% OF REQUIRED SHRUBS (2,800 SHRUBS)	2,800+ SHRUBS

Legend



NOTE:
PROPOSED IMPROVEMENTS WILL
NOT BE VISIBLE FROM SOUTH
OCEAN BOULEVARD OR
NEIGHBORING PROPERTIES



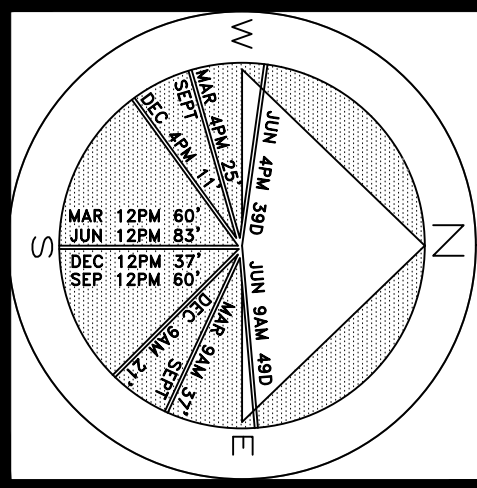
ENVIRONMENT
DESIGN
GROUP

139 North County Road 5400-B Palm Beach, FL 33480
Phone 561.832.4800 Mobile 561.313.4424

Landscape Architecture
Land Planning
Landscape Management

Dustin M. Mizell, MIA RLA #6666784
Dustin@environmentdesigngroup.com

Private Residence
2000 South Ocean Boulevard
Manalapan



JOB NUMBER: # 23158.00 LA
DRAWN BY: Jean Twomey
Valeria Quintanilla
DATE: 02.27.2024

SHEET L1.0

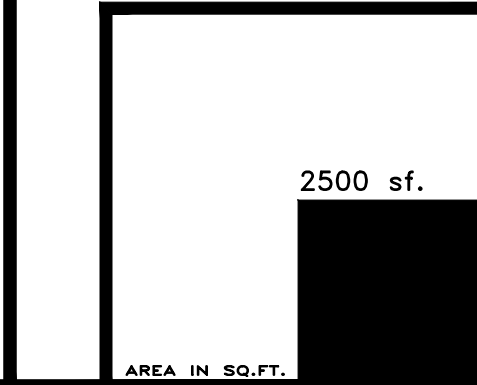
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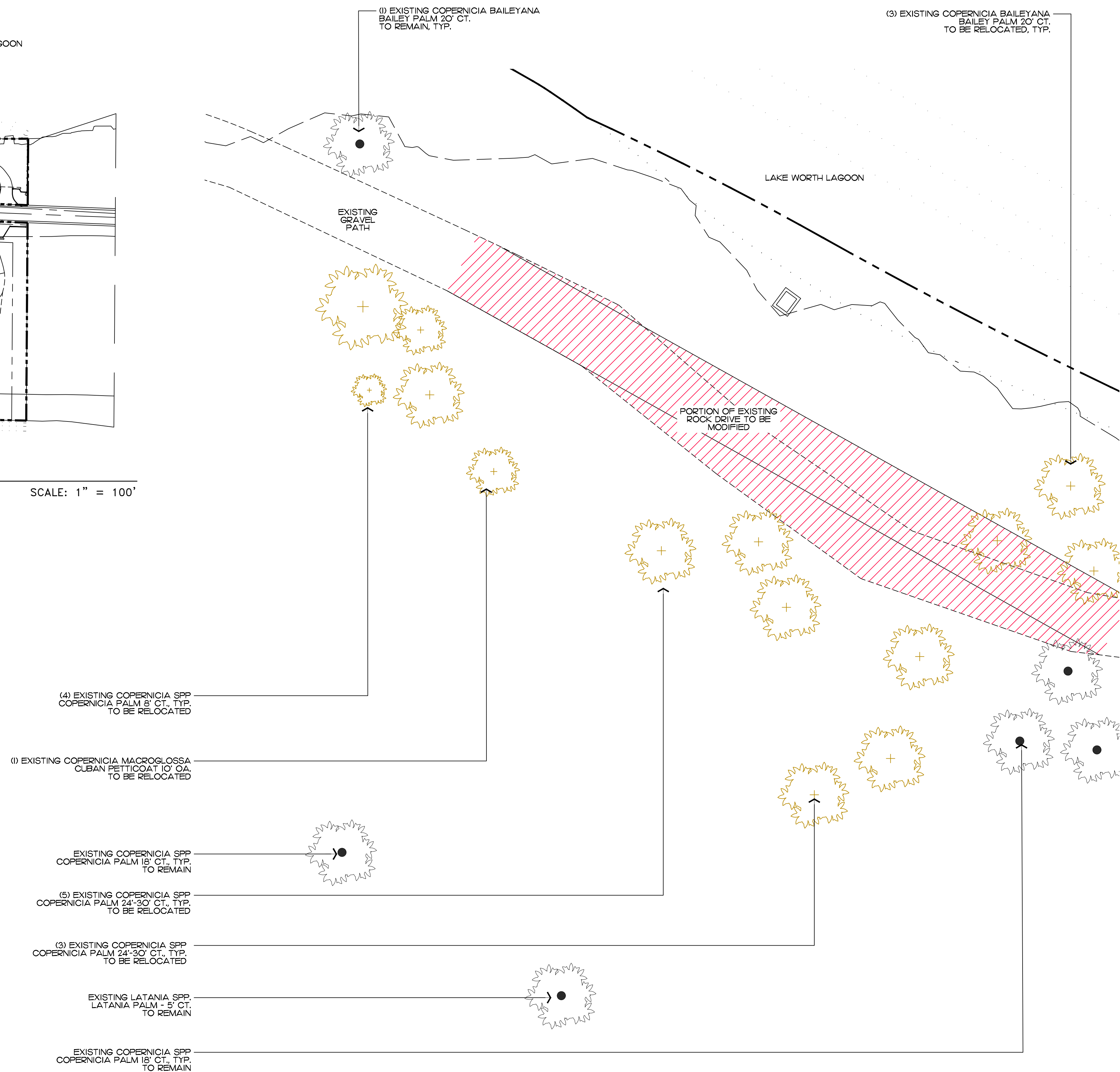
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CALL TOLL FREE
1-800-432-4770
SUNSHINE STATE ONE CALL
OF FLORIDA, INC.



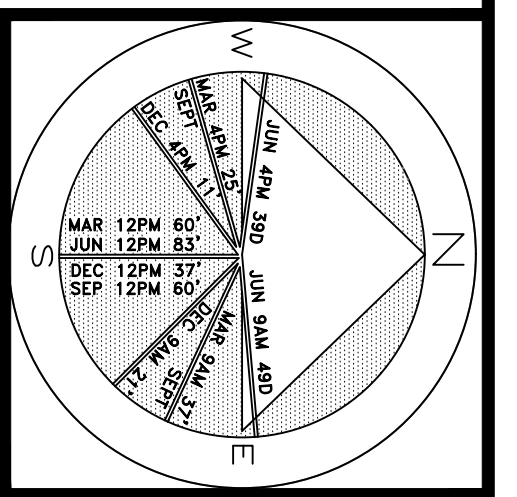
Key Plan

SCALE: 1" = 100'

NOTES:
NO EXISTING TREES OR
PALMS WILL BE REMOVED.
SEE SHEETS L2.1 AND 3.1
FOR NEW LOCATIONS



Private Residence
2000 South Ocean Boulevard
Manalapan



JOB NUMBER: # 23158.00 LA
DRAWN BY: Sean Twomey
Valeria Quintanilla
DATE: 02.27.2024

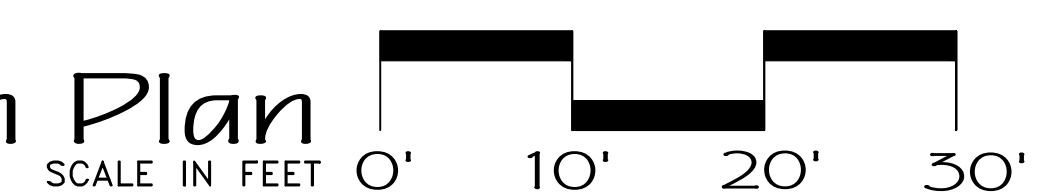
SHEET L2.0

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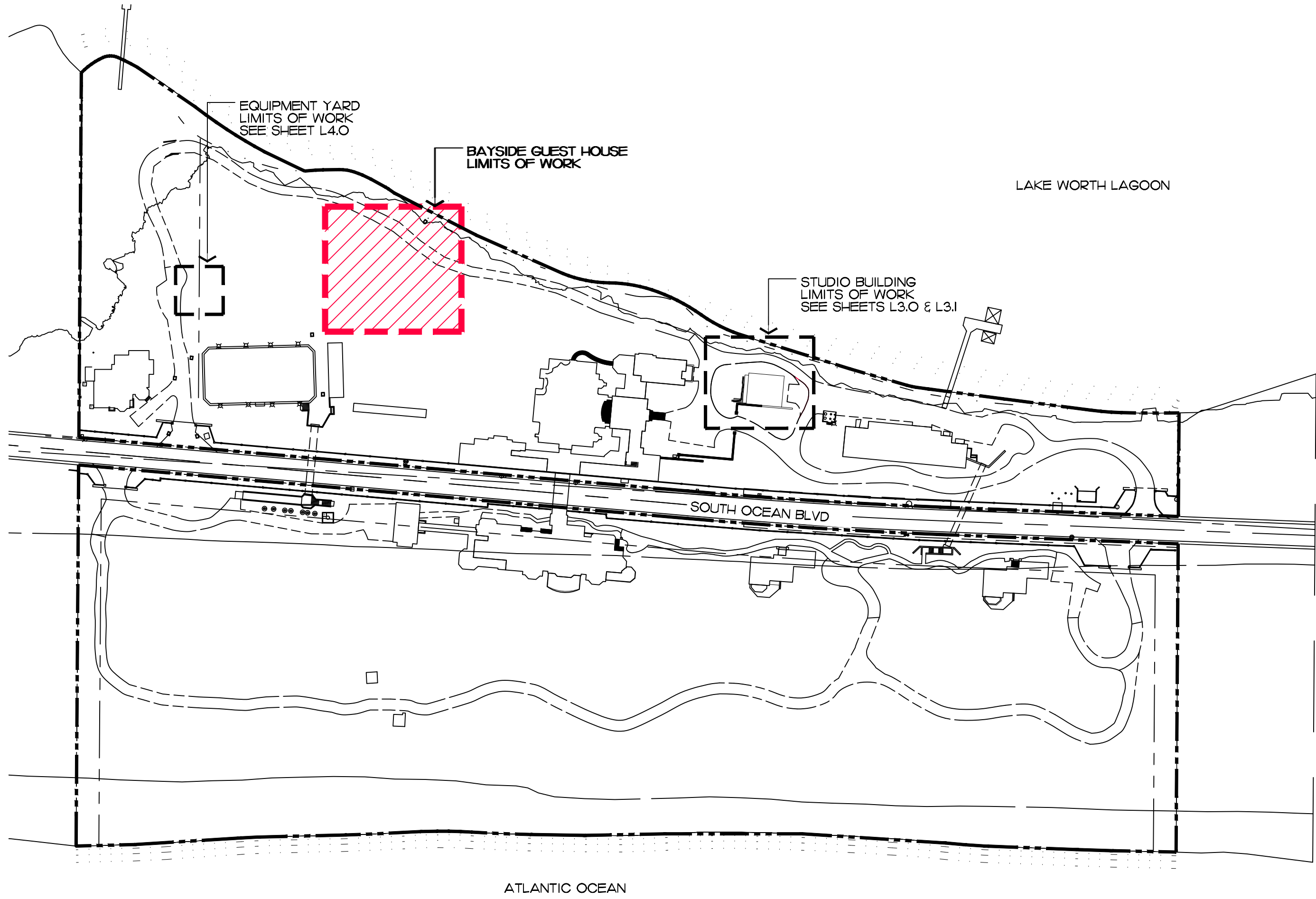
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SUNSHINE STATE ONE CALL
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Guest House - Existing Conditions/Vegetation Action Plan



0 sf.

AREA IN SQ.FT.



Key Plan

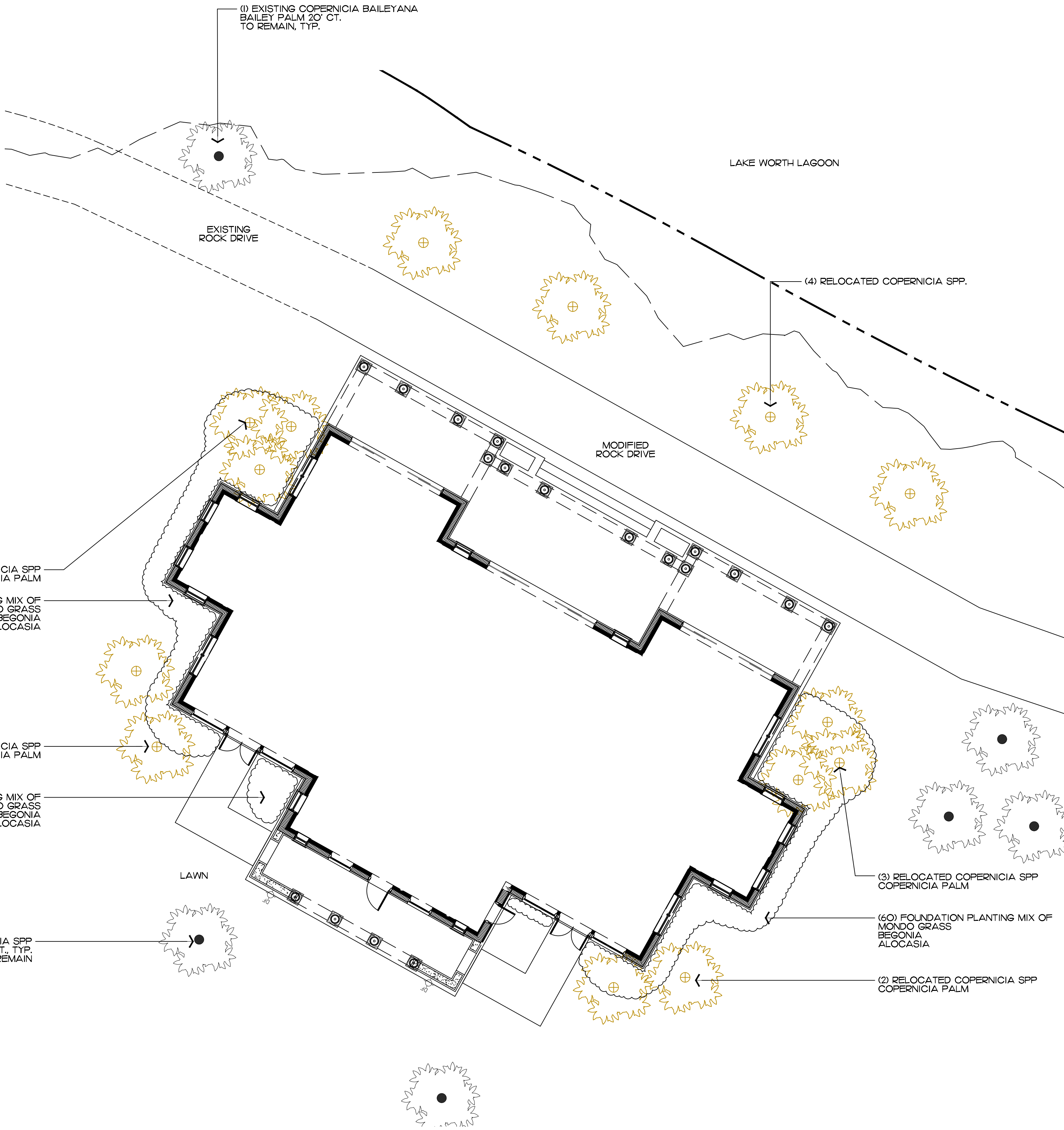
SCALE: 1" = 100'

Relocated Trees

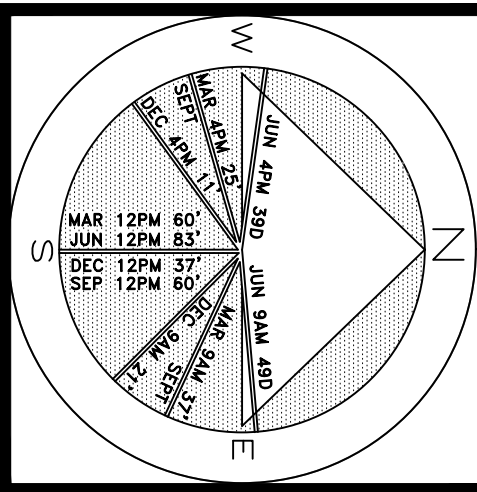
SYMBOL	PLANT NAME	QTY.	DESCRIPTION
	COPERNICIA SPP COPERNICIA PALM	14	EXISTING TO BE RELOCATED VARYING HEIGHTS REFER TO SHEET L2.0

Proposed Shrubs

SYMBOL	PLANT NAME	QTY.	DESCRIPTION
	FOUNDATION PLANTING MIX OF MONDO GRASS BEGONIA SPP. ALOCASIA SPP.	50 60 30	1 GAL, 24" OC 5 GAL, 24" OC 7 GAL, 24" OC



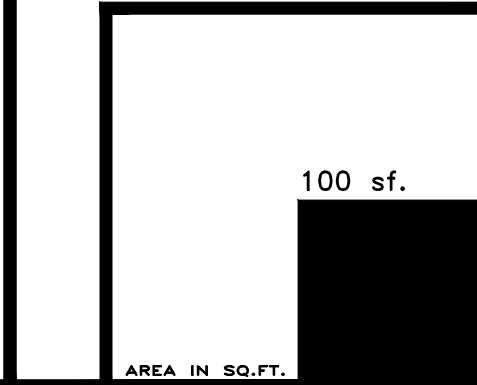
Private Residence
2000 South Ocean Boulevard
Manalapan

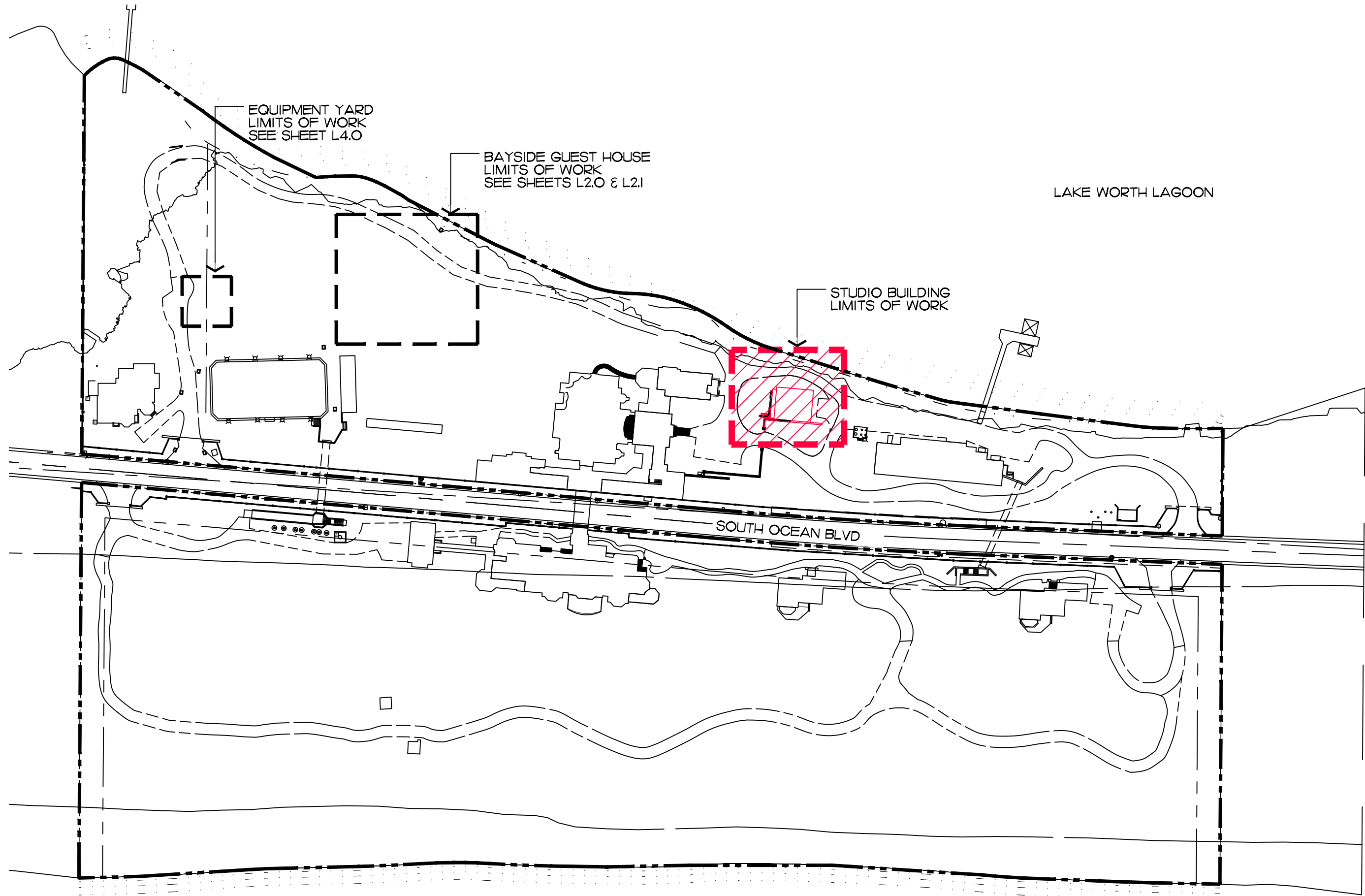


JOB NUMBER: # 23158.00 LA
DRAWN BY: Jean Twomey
Valeria Quintanilla
DATE: 02.27.2024

SHEET L2.1

Guest House - Landscape Plan

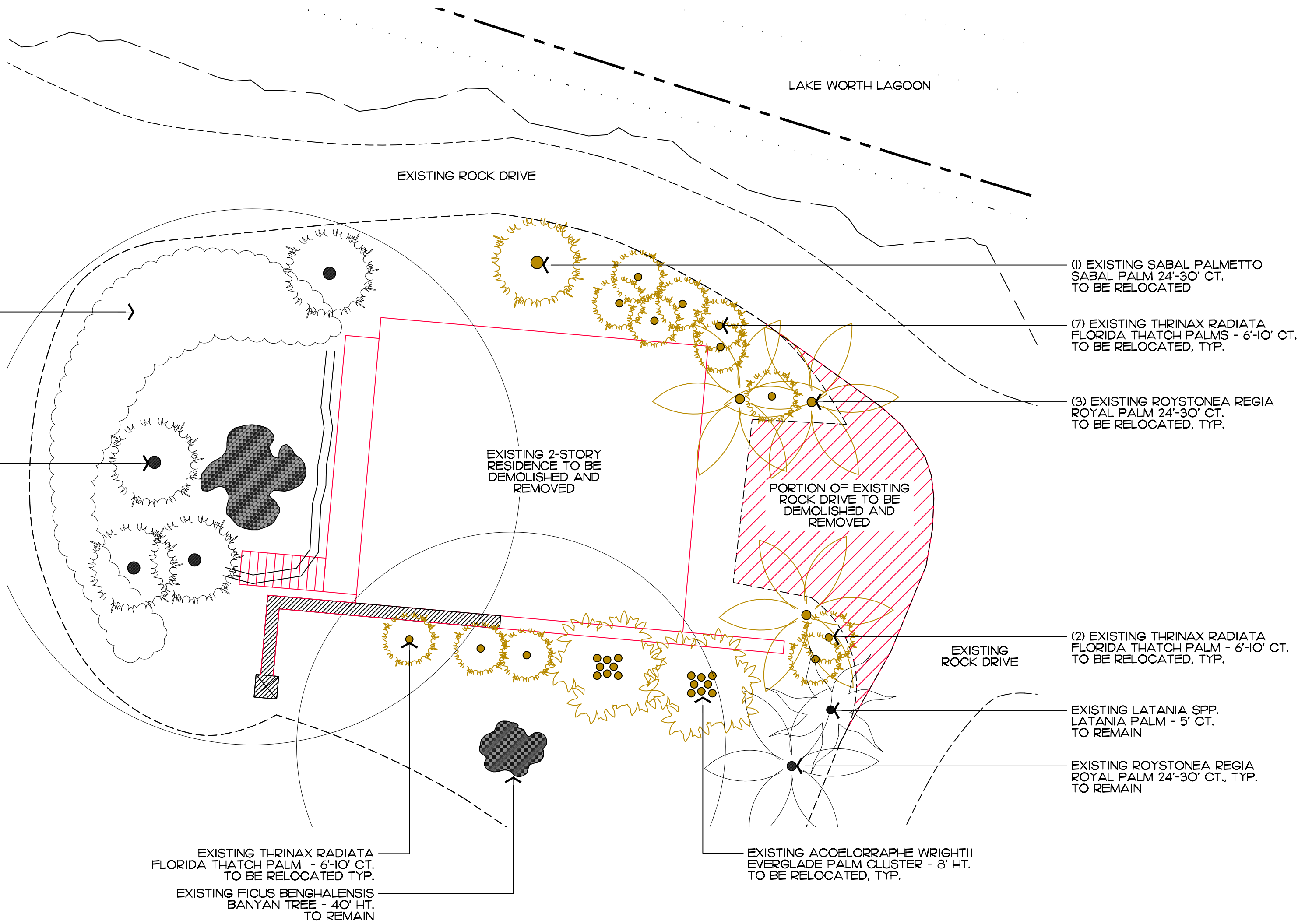




Key Plan

SCALE: 1" = 100'

NOTES:
NO EXISTING TREES OR
PALMS WILL BE REMOVED.
SEE SHEETS L2.I AND 3.I
FOR NEW LOCATIONS



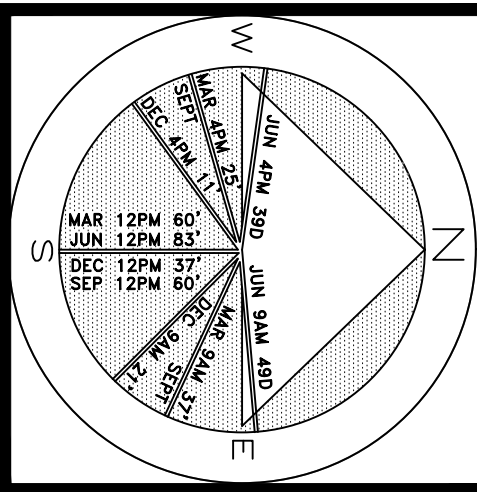
Studio Building - Existing Conditions/Vegetation Action Plan

SCALE IN FEET 0' 10' 20' 30'

100 sf.

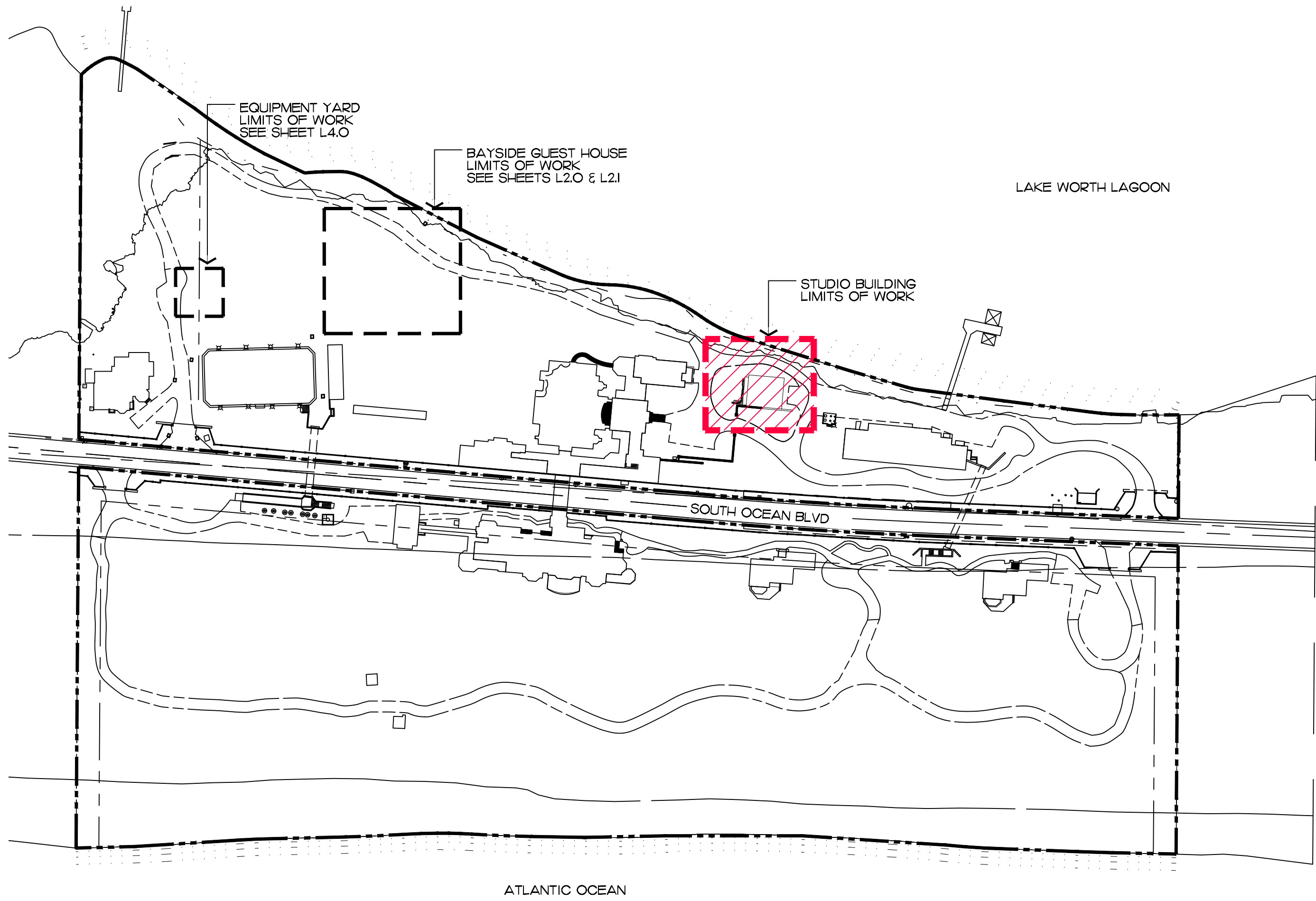
AREA IN SQ.FT.

Private Residence 2000 South Ocean Boulevard Manalapan



JOB NUMBER: # 23158.00 LA
DRAWN BY: Jean Twomey
Valeria Quintanilla
DATE: 02.27.2024

SHEET L3.0



Key Plan

Relocated Trees

SYMBOL	PLANT NAME	QTY.	DESCRIPTION
	ACOEORRAPHE WRIGHTII EVERGLADES PALM	2	EXISTING TO BE RELOCATED VARYING HEIGHTS
	ROYSTONEA REGIA ROYAL PALM	3	EXISTING TO BE RELOCATED VARYING HEIGHTS
	SABAL PALMETTO SABAL PALM	1	EXISTING TO BE RELOCATED
	THRINAX RADIATA FLORIDA THATCH PALM	12	EXISTING TO BE RELOCATED VARYING HEIGHTS

Proposed Shrubs

SYMBOL	PLANT NAME	QTY.	DESCRIPTION
	FOUNDATION PLANTING MIX OF MONDO GRASS, GROUND ORCHIDS, TI PLANT, BROMELIAD, BEGONIA, PEACE LILY	50 50 24 50 50 20	1 GAL, 36" OC 3 GAL, 36" OC 7 GAL, 36" OC 7 GAL, 36" OC 7 GAL, 36" OC 3 GAL, 36" OC

SCALE: 1" = 100'

(5) RELOCATED THRINAX RADIATA
FLORIDA THATCH PALM - 6'-10' CT

(57) PROPOSED FOUNDATION PLANTING,
5 GAL, 36" OC
MIX OF MONDO GRASS,
GROUND ORCHIDS,
TI PLANT,
BROMELIAD,
BEGONIA,
PEACE LILY

EXISTING SHRUBS
- FERN VARIETIES
- ALOCASIA VARIETIES
- MONSTERA
TO BE ENHANCED

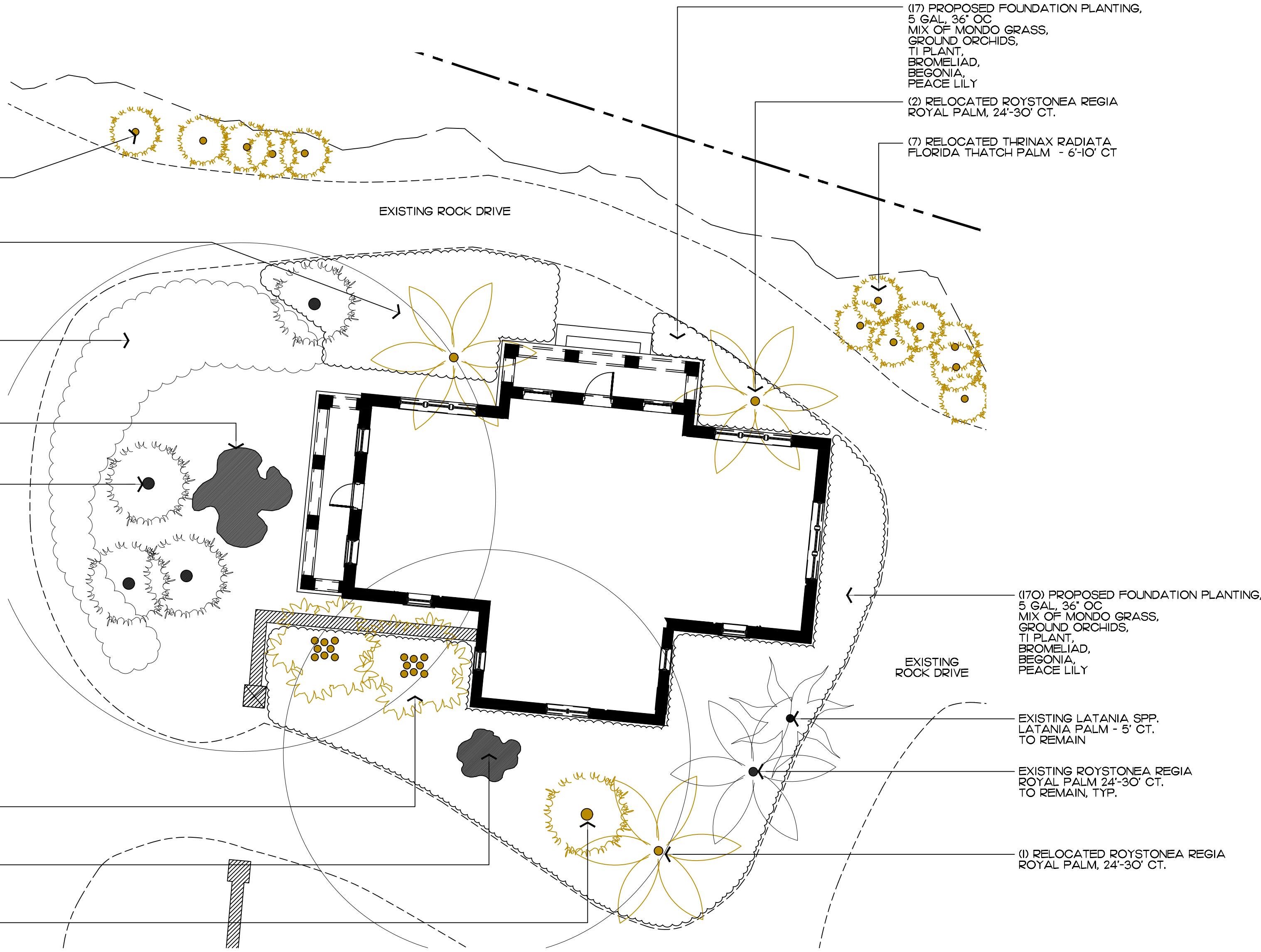
EXISTING FICUS BENGHALENSIS
BANYAN TREE - 40' HT.
TO REMAIN

EXISTING SABAL PALMETTO
SABAL PALM 24'-30" CT.
TO REMAIN, TYP.

(2) RELOCATED ACOEORRAPHE WRIGHTII
EVERGLADE PALM CLUSTER
8' HT., TYP.

EXISTING FICUS BENGHALENSIS
BANYAN TREE - 40' HT.
TO REMAIN

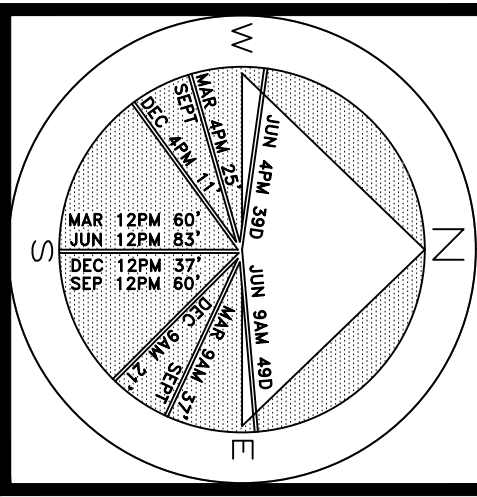
EXISTING SAAL PALMETTO
SABAL PALM, 24'-30' CT.
TO REMAIN



Studio Building - Landscape Plan

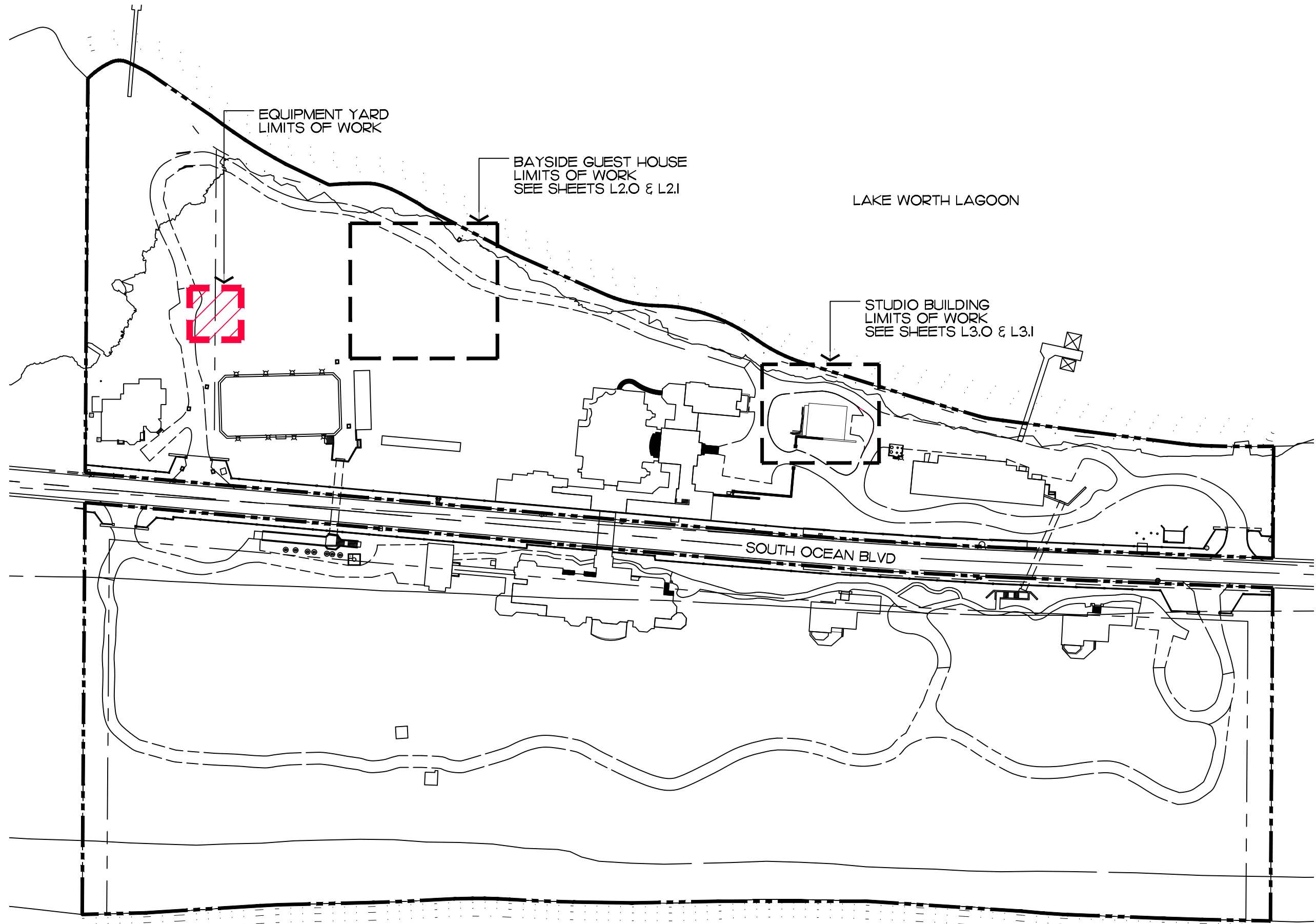
SCALE IN FEET 0' 10' 20' 30'

Private Residence
2000 South Ocean Boulevard
Manalapan



JOB NUMBER: # 23158.00 LA
DRAWN BY: /ean Twomey
Valeria Quintanilla
DATE: 02.14.2024

SHEET L3.1



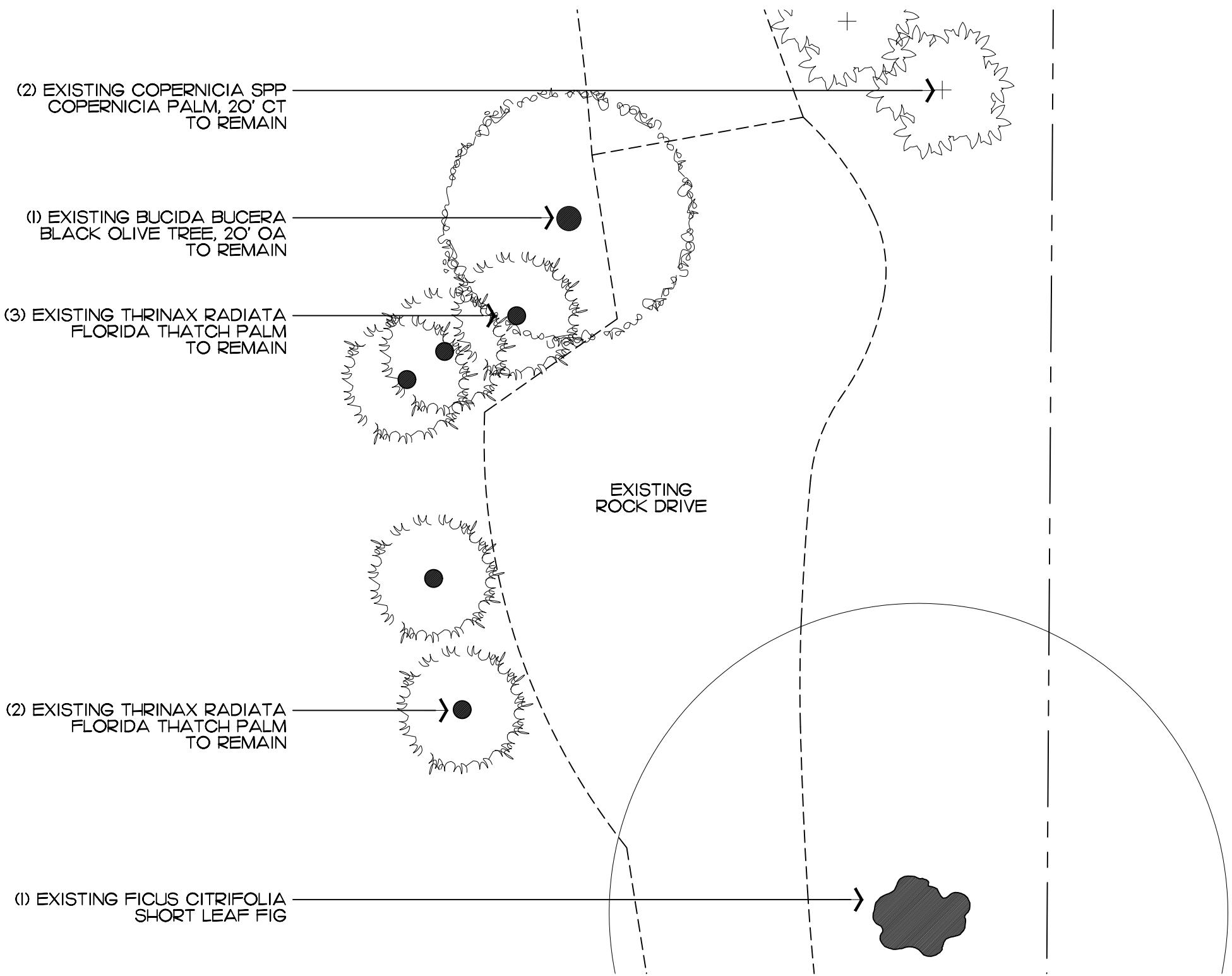
Key Plan

SCALE: 1" = 100'

NOTES:
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SEE SHEETS L2I AND 3.I
FOR NEW LOCATIONS

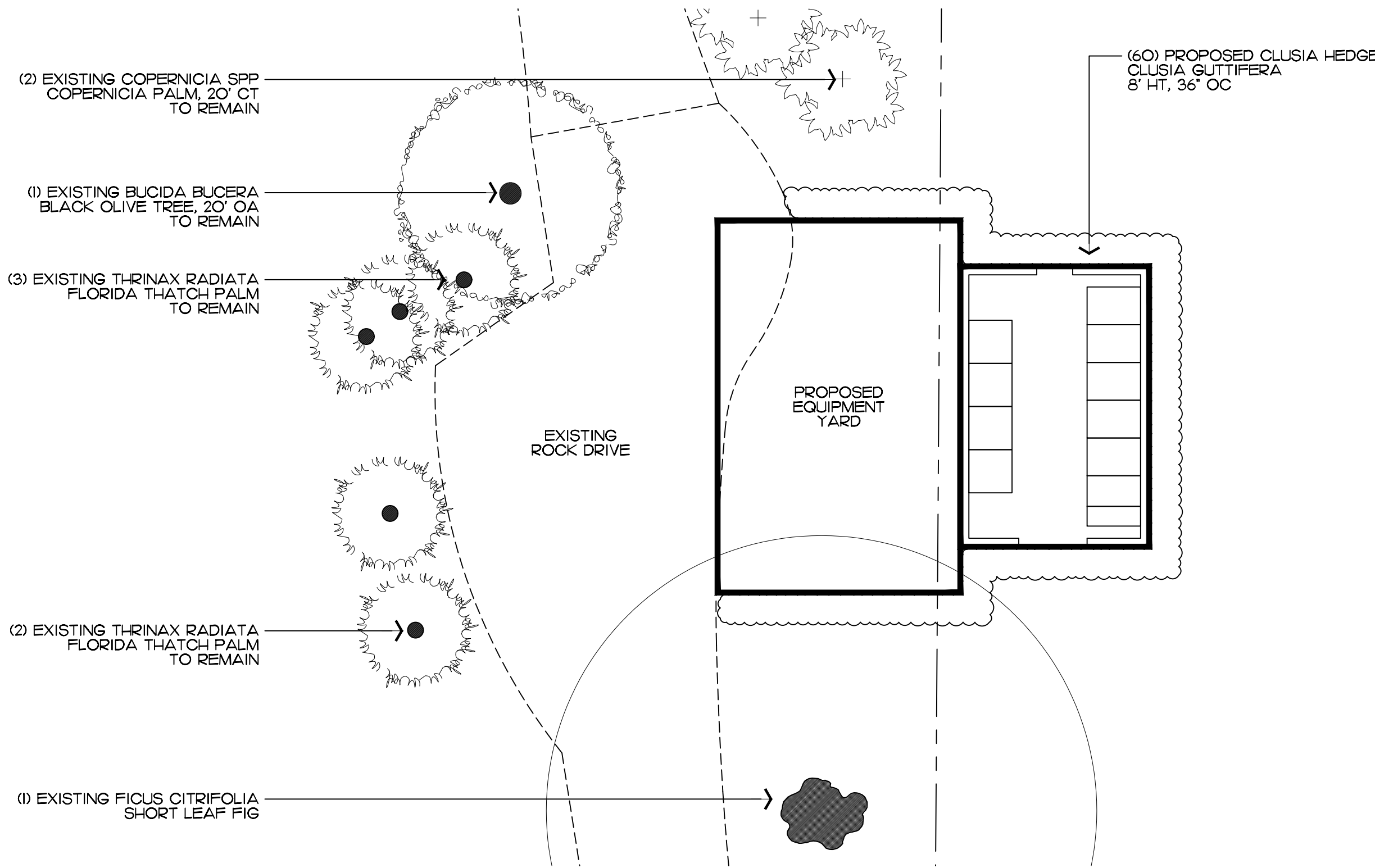
Proposed Shrubs

SYMBOL	PLANT NAME	QTY.	DESCRIPTION
	CLUSIA GUTTIFERA CLUSIA HEDGE	60	8' HT, 36" OC



Existing Conditions/Vegetation Action Plan

SCALE: 1" = 10'



Landscape Plan

SCALE: 1" = 10'

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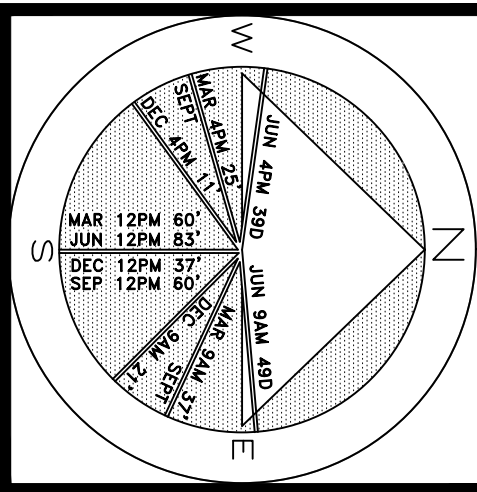
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SUNSHINE STATE ONE CALL
OF FLORIDA, INC.

Equipment Yard

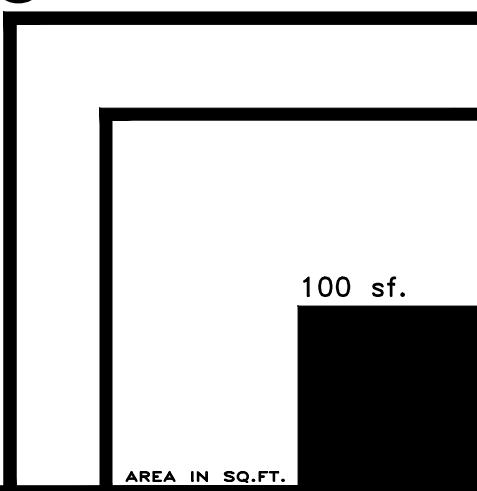
SCALE IN FEET 0' 10' 20' 30'

Private Residence 2000 South Ocean Boulevard Manalapan



JOB NUMBER: # 23158.00 LA
DRAWN BY: Jean Twomey
Valeria Quintanilla
DATE: 02.27.2024

SHEET L4.0





TOWN OF MANALAPAN AGENDA ITEM SUMMARY

Meeting Date: April 23rd, 2024

Agenda Item No.: RA 2

Agenda Item Name: Awarding of Contract for Audit Services

ACTION REQUESTED: Discussion ☐ Action ☐

BACKGROUND:

The contract for the Town's current auditor, Nowlen, Holt & Miner, is set to expire this year. At the February 28th, 2024, meeting a list of names was submitted for the Audit Selection Committee. The Commission approved the appointment of Chairman John Deese, Vice Mayor; Gregory Dunham, Town Manager Gulfstream, and David DiLena, Finance Director, Town of Highland Beach. The Selection Committee met on March 1st, 2024, to review the RFP selection criteria that was then subsequently approved. After all proposals were received and opened on April 5th, 2024, the Selection Committee then met on April 12th, 2024, to evaluate and rank the four proposals that were submitted. Carr, Riggs & Ingram, Grau & Associates, Marcum, and Mauldin & Jenkins submitted proposals. The following reflects the ranking: 1. Mauldin & Jenkins 2. Marcum 3. Grau & Associates and 4. Carr, Riggs & Ingram.

The Selection Committee unanimously agreed on the final rankings and recommend awarding a contract to the top-ranked firm, Mauldin & Jenkins, for an initial five-year term as the Town's new auditor.

ATTACHMENT:

- Mauldin & Jenkins Proposal
- Final Selection Committee Scores

MAULDIN & JENKINS

mjcpa.com

1401 Manatee Avenue West, Suite 1200

Bradenton, FL 34205



Town of Manalapan, Florida

RFP No. 24-001

Proposal to Provide Annual Audit Services
Fiscal Years September 30, 2023 through 2027

Mauldin & Jenkins, LLC Certified Public Accountants

Contact Persons: Daniel Anderson, CPA, Partner and
Wade Sansbury, CPA, Partner

Phone: 941-747-4483

Fax: 941-747-6035

Emails: danderson@mjcpa.com wsansbury@mjcpa.com

April 5, 2023 | 3:00 PM



Going Further.

ELECTRONIC COPY



Table of Contents

Letter of Transmittal.....	1
- Executive Summary	3
Profile of the Proposer	6
- Independence	7
- Membership	7
- Quality Control Review (Peer Review).....	7
- Experience with EDP Systems and Extent of the Use of Audit Software in the Engagement	9
- Computer Assistance Capability.....	10
Ability to Furnish Required Services.....	11
- Audit Methodology	11
- Proposed Segmentation of the Engagement	11
- Level of Staff and Number of Hours to be Assigned	14
- Type and Extent of Analytical Procedures to be Used in the Engagement.....	14
- Approach to be taken to Gain and Document an Understanding of the Town’s Internal Control Structure	15
- Approach to be taken in Determining Laws and Regulations to be Subject to Audit Test Work	16
- Approach to be taken in Drawing Audit Samples for Purposes of Tests of Compliance	16
- Sampling Techniques and the Extent to Which Statistical Sampling Will be Used in the Engagement	18
- Assistance with GASB Pronouncements	19
- Methodology to be Used in Performing the “Risk Based” Approach in Determining Major Federal Programs.....	19
- Identification of Anticipated Potential Audit Problems	20
- Process to Produce a Meaningful Management Letter.....	21
- Availability of Personnel.....	21
Proposed Contract Team.....	22
- Individual Resumes of Key Personnel	23
- Other Staff Resources (Technology Services and Fraud Examinations)	34
- Partner and Staff Continuity.....	38
- Continuing Education of Partners and Staff	38
Experience and Qualifications	39
- Firm Qualifications and Experience.....	39
- Location of the Office from which the Work is to be Performed	40
- Range of Activities.....	41
- Governments Served in the Past Five Years.....	42
- Certificates of Achievement and Excellence in Financial Reporting.....	44
- Single Audit Experience	45
- No Litigation, Federal/State Desk Reviews or Disciplinary Action.....	46
- Governmental Attestation Services.....	47
- Governmental IT Solutions.....	47
- Governmental Advisory Services.....	48
- Similar Engagements.....	49

Table of Contents (Continued)

<i>Schedule of Fees</i>	<i>52</i>
<i>Additional Data</i>	<i>53</i>
- <i>Florida Licenses</i>	<i>53</i>
- <i>Certificates of Insurance</i>	<i>55</i>
- <i>Proposal Form</i>	<i>58</i>
- <i>Attachment B: Equal Opportunity Pledge</i>	<i>60</i>
- <i>Bid Certification.....</i>	<i>61</i>
- <i>Drug-Free Workplace Form.....</i>	<i>63</i>
- <i>E-Verify</i>	<i>64</i>
- <i>Public Entity Crimes Form</i>	<i>65</i>
- <i>Scrutinized Vendor Certification.....</i>	<i>67</i>
- <i>Addenda Acknowledgement.....</i>	<i>68</i>
- <i>References.....</i>	<i>69</i>

Letter of Transmittal

April 5, 2024

Town of Manalapan
Auditor Selection Committee
600 South Ocean Blvd
Manalapan, Florida 33462

Ladies and Gentlemen:

We appreciate the opportunity to propose on providing audit services to the Town of Manalapan, Florida (the "Town"), and we are pleased to submit a qualifications package including cost estimates to provide annual financial and compliance auditing services for the Town. The contract for such audit services will be for the fiscal years ending September 30, 2023 through 2027.

We have read the Request for Proposal (RFP) and fully understand its intent and contents. We understand the timeframe for performance of the annual financial audits as stipulated by the Town and agree to provide the services described in the proposal. We will conduct preliminary and final fieldwork and will work with the Town as closely as possible to issue all of the deliverables ahead of the Town deadline. Our Firm is, and all significant personnel listed within this proposal are, licensed to practice in the State of Florida and are qualified to provide all services requested by the Town. We are a southeastern regional firm with Florida offices in Bradenton and Sarasota. Our Bradenton office location has approximately 45 employees available to serve the Town.

Mauldin & Jenkins is committed to client service and to building relationships with our clients, obtaining a thorough understanding of our client's organization and needs, working with clients as trusted advisors, and delivering a high-quality final product on time. We have been in continuous operation for over 100 years and believe that we are the best qualified to serve the Town due to the following:

- **Governmental Experience:** Our Firm has made the governmental sector a primary industry focus. We have served the audit and compliance needs of numerous governmental entities over the years and remain committed to serving this sector. We provide the following statistics related to our governmental practice:
 - **Over 700 governmental entities** served in the Southeast on an annual basis, which includes **over 150 municipalities**.
 - **150+ full-time equivalent professionals** with current governmental accounting experience.
 - We serve over **150 entities** who receive the **GFOA Certificate of Achievement for Excellence in Financial Reporting** on an annual basis.
 - We serve as the plan auditor for approximately **30 single employer defined benefit pension plans** in Florida, and currently audit in excess of \$2.5 billion in Florida pension assets.
 - We serve over **290 entities** requiring **federal/state Single Audits** annually.
- **Experience with Notable Municipalities in the Southeast:** We are the current auditor of some of the most notable and recognized municipalities in the Southeast. These clients include Tequesta, Jupiter Island, and Juno Beach, Florida; Atlanta and Savannah, Georgia; and Charleston, South Carolina.

- **Experienced Personnel:** The personnel included in this proposal for your engagement have numerous years of professional experience in the governmental sector and are dedicated to serving this industry. We make every effort to retain experienced and qualified staff which will assist in providing staff continuity. The quality of the proposed engagement team is the clearest evidence of our commitment to serve you.
- **Responsiveness and Large Firm Resources with Small Firm Sensitivity:** We pride ourselves in responding to the needs of our clients; not only the ability to meet deadlines, but also to respond to other requests. Our ability to be responsive is enhanced by the open communications and good working relationship we have with our clients. Our resources provide for the flexibility to meet your needs and to perform our services in an efficient and effective manner.
- **Information Technology Services:** We are proud to be one of the few firms in the Southeast to utilize Artificial Intelligence tools as part of our audit process. We also use a web-based file transfer software called Suralink. These tools provide for a more effective and efficient audit. We also have resources to address the evolving cybersecurity threats to your government by having Certified Information Systems Auditors ("CISA") on staff and who are certified by the American Institute of CPAs ("AICPA") to provide cybersecurity advisory services and the newly created cybersecurity assessment.
- **Education:** Presently, Mauldin & Jenkins clients have the opportunity to register and receive a minimum of sixteen hours of complimentary continuing education on an annual basis. We take our experience in serving governments, and choose timely and relevant topics to provide ongoing education to our clients. We believe education and training to be a key element of serving our governmental clientele. These classes are taught by Mauldin & Jenkins professionals, who also spend time each year teaching at various National and State Governmental Conferences.
- **Nationally Recognized:** Mauldin & Jenkins is consistently ranked in the Top 100 by various publications as one of the largest certified public accounting firms in the country. We are a regional firm, but the Firm's influence is shared nationally. Our partners have volunteered to serve: as the American Institute of CPA's (AICPA's) sole representative to Government Accounting Standards Advisory Council (GASAC); the 2015 Chairman of the Board of the AICPA; and a board member of the International Federation of Accountants (IFAC) in 2016. In January 2020, our own Joel Black accepted the opportunity to serve as the Chairman of the Governmental Accounting Standards Board (GASB). Mauldin & Jenkins is a leader nationally.

We realize the difficulty in selecting an audit firm. By selecting Mauldin & Jenkins, you will be provided excellent client service and operational best practices stemming from our service to hundreds of governmental entities. We understand the work requested and are committed to meeting your needs. Thank you very much for considering our Firm and allowing us to present our proposal. This proposal represents a firm and irrevocable offer for 90 days from the date of the proposal. As a partner of Mauldin & Jenkins, Daniel Anderson is authorized to bind and make representations for the Firm. He will be the ultimate party responsible for the quality of the report and working papers. Daniel and Wade are both out of our Bradenton, Florida office.


Wade P. Sansbury, CPA, Partner
wsansbury@mjcpa.com
941-741-2255 (direct)

Sincerely,
MAULDIN & JENKINS, LLC


Daniel R. Anderson, CPA, Partner
danderson@mjcpa.com
1401 Manatee Ave West, Suite 1200
Bradenton, Florida 34205
Fed ID: 58-0692043
941-741-2213 (direct)

Executive Summary

With extensive partner involvement and a team of dedicated governmental specialists, Mauldin & Jenkins will provide the Town of Manalapan, Florida with the service and insight needed to achieve your goals.

Our Understanding of the Town of Manalapan's Requirements/Needs

The Town desires our Firm to express an opinion on the fair presentation of its basic financial statements in conformity with generally accepted accounting principles. Our audit will be conducted in accordance with auditing standards and procedures recommended by the American Institute of Certified Public Accountants, the standards for financial audits as set forth in the U.S. General Accounting Office's *Government Auditing Standards*, and the provisions of the U.S. Office of Management and Budget Uniform Guidance (formerly Circular A-133), the Florida Single Audit Act, and the Rules of the State of Florida Auditor General as amended. We will provide the following as required by the Town and the Community Redevelopment Agencies, as applicable:

- An independent auditor's report on the fair presentation of the Governmental Activities, the Business-Type Activities, each Major Fund, and the aggregate remaining fund information, which collectively comprise the Town's basic financial statements in conformity with generally accepted accounting principles, including an opinion on the fair presentation of the supplementary information and the Schedule of Expenditures of Federal and State Awards "in relation to" the audited financial statements, if applicable.
- An independent auditor's report on internal control over financial reporting and on compliance and other matters based on an audit of financial statements performed in accordance with *Government Auditing Standards*. Which will include any reportable conditions.
- An independent auditor's report on compliance for each major program and on internal control over compliance required by OMB Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards and Chapter 10.550, Rules of the Auditor General of the State of Florida. These reports will include any reportable conditions or instances of noncompliance.
- A management letter that outlines any constructive suggestions for improvement to management.
- An independent accountant's report on our examination of the Town's compliance with Section 218.415, Florida Statutes, with respect to the Town's investment of public funds.
- Support and assistance in the implementation of any new changes in regulations by the GASB, FASB, GAO or the Auditor General.
- Any additional auditing services or agreed upon procedures required by the Town. These services/procedures will be performed only upon approval of a written agreement between the Town and Mauldin & Jenkins, LLC.

To effectively address these issues and meet your key short- and long-term objectives, the Town needs dependable, objective information. Therefore, as shown in *Figure 1*, you are seeking a proven, local firm to:

With one of the largest governmental audit practices in the Southeast, our team will ensure efficiency, minimal disruptions, and substantial insight for the Town's management and Commission Members.

Not Only

- Perform an annual audit and report on the financial statements of the Town
- Perform an annual compliance audit for the Town including the performance of state and federal Single Audits

But Also

- Candidly communicate with management regarding results and industry and regulatory updates, allowing for greater efficiency and better decision making
- Actively involve senior team members in all phases of the engagement, ensuring reliable, responsive service and quick issue resolution
- Provide value-added recommendations to strengthen the Town's operations and internal controls

Figure 1. *Our Understanding of the Town of Manalapan's True Service Needs*

An Efficient, Value-Added Approach to Achieving Your Objectives

Our approach will be rooted in continuous communication with the Town's management and Audit Committee. From day one, our team will take the time to understand your issues and keep you abreast of changing financial demands.

This knowledge will allow us to maximize efficiency, minimize disruptions, and tailor our approach to your operations. Further, partners Daniel Anderson and Wade Sansbury will personally oversee each engagement step, ensuring dependable service and guidance.

Ultimately, our team will deliver reliable, insightful information, as well as valuable recommendations to improve the Town's controls and strengthen your operations.

Why Mauldin & Jenkins Is Best Suited to Serve the Town

As shown in *Figure 2*, our team’s expertise, dedication, and proactive approach are ideally suited to serve the Town.

Our team’s depth of governmental experience, training, and industry involvement will yield valuable intelligence, allowing the Town to leverage best practices and advance operational performance.

Mauldin & Jenkins Differentiator	Benefit to the Town of Manalapan
Maximizing Efficiency with Deep Governmental Experience	
In addition to serving more than 700 governmental entities throughout the Southeast, from small special districts to large entities with over \$4.5 billion in assets, our professionals serve in leadership and instructor roles for various state governmental associations, governmental schools, and industry organizations including the AICPA.	Our team’s depth of governmental expertise, combined with their professional and industry involvement, gives them up-to-date knowledge of the trends, regulations, and standards affecting the Town—allowing them to quickly address technical and operational issues.
Strengthening Operations with Frequent, Value-Added Communication	
Our team members and Firm publications, such as our quarterly newsletter and free continuing professional education classes, will provide the Town with regular updates of and guidance on regulatory, industry, and accounting developments.	Instead of just resolving your financial statement and grant compliance issues, our governmental specialists will also help prevent them—empowering the Town with the knowledge and best practices to strengthen your operations.
Ensuring Dependability with Continuity and Active Leader Involvement	
Our team will feature ongoing partner involvement throughout every audit phase—including fieldwork—as well as a dedication to staff continuity. And with an annual turnover rate well below the industry average, we can deliver.	With dependable oversight and a long-term commitment to team staffing, the Town will enjoy reliable, responsive, and time-saving service from professionals with a deep understanding of your structure and challenges.
Fulfilling Long-Term Service Needs with a Depth of Firm Resources	
In addition to being one of the oldest and largest regional accounting firms in the Southeast, Mauldin & Jenkins has a 100+ year track record of providing high-quality service to governmental entities across the Southeast.	With 160 governmental specialists and more than 500 professionals across several specialties, we have the resources, capability, and expertise to meet your long-term service needs as the Town grows and changes.

Profile of the Proposer

Firm Name: Mauldin & Jenkins, LLC
Address: 1401 Manatee Avenue West, Suite 1200
Bradenton, Florida 34205
Additional Locations: Sarasota, Florida; Albany, Macon, Atlanta, Savannah, Sandy Springs, Georgia; Raleigh, North Carolina; Columbia, South Carolina; Chattanooga, Tennessee; Athens, Birmingham, Huntsville, Florence, Alabama
Principal Contacts: Daniel Anderson, danderson@mjcpa.com (address above)_and Wade Sansbury, wsansbury@mjcpa.com
Phone: 941-747-4483
Fax: 941-747-6035
Federal ID: 58-0692043
Website: www.mjcpa.com

Date Established Under Name Given: State of Florida – 5/11/2011; State of Georgia – 1918

Type of Ownership/Legal Structure: Mauldin & Jenkins is a limited liability corporation (LLC). Our Firm is incorporated in the States of Florida, Georgia, Alabama, Tennessee, and South Carolina.

Independence

We hereby affirm that Mauldin & Jenkins, LLC is independent with respect to the Town. We meet the independence standards of Generally Accepted Auditing Standards issued by the Comptroller General of the U.S. and the U.S. Government Accountability Office's *Government Auditing Standards*. We are also independent with respect to the Town within the meaning of Rule 101 of the Code of Professional Ethics of the American Institute of Certified Public Accountants and the applicable published rules and interpretation thereunder.

We conduct our audits objectively and will report findings, opinions, and conclusions objectively. As noted above, we are free from personal and external impairments to independence, are organizationally independent, and will maintain an independent attitude and appearance so that opinions, conclusions, judgments, and recommendations are impartial and will be viewed as impartial by knowledgeable parties. There are no situations that might lead others to question our independence. We have not had a professional relationship with the Town of any kind over the past five years. We also agree to give written notice to the Town in the event we do enter into any professional relationship during the period of this agreement.

Membership

Our Firm is a member in good standing with all of the following professional organizations: American Institute of Certified Public Accountants (AICPA), Florida Institute of Certified Public Accountants (FICPA), Government Finance Officers Association (GFOA), the Florida FGOA, and the AICPA Governmental Audit Quality Center. We are committed to the governmental sector as well via our involvement with these organizations as well as our volunteer work we provide via training and speaking engagements with these and other organizations. Note that as mentioned in our Letter of Transmittal, our very own Joel Black is now currently serving as Chair of the Governmental Accounting Standards Board. We have also had Firm personnel serve as the Florida Institute of CPAs Board Chairman and the AICPA Board Chairman. These are all evidence of our presence within the national governmental market place and also serves as examples of our commitment to the governmental sector.

Quality Control Review (Peer Review)

In the mid-70s, the Private Companies Practice Section (PCPS) was founded by the American Institute of CPAs (AICPA) to establish a voluntary quality assurance program for CPA firms. There are requirements for membership in the section, which include mandatory continuing education for each member of the professional staff and a key element is a tri-annual independent review of a firm's quality control system in its practice of public accounting. Mauldin & Jenkins has been a member of the section from its inception. The peer review aspect has evolved from being voluntary to mandatory and Mauldin & Jenkins is in full compliance with the requirements of having a tri-annual review. In the peer reviewer's latest report dated November 12, 2020, our reviewing firm gave a rating of "pass" which is the highest form of assurance a reviewing firm can render on the system of quality control for our accounting and audit practice. Our report for the year ended May 31, 2023 is currently being reviewed by the AICPA. No issues are anticipated with the newest report.

A copy of the report on external quality control review is provided on the following page. **The quality control review included a review of specific government engagements.** No letter of comment was received as a result of this review. We are quite proud to be one of the few Southeast based firms to have undergone this review and to have received such an excellent opinion from a large reputable national firm. Our public company practice is also reviewed in accordance with CAQ requirements as administered through the Public Company Oversight Board (PCAOB). Also note, that as part of our quality control system, we perform internal peer reviews by office to ensure compliance with these standards during the two-year break period between external peer reviews. Wade Sansbury, Adam Fraley, Daniel Anderson, Trey Scott and Alison Wester have all participated in this process. Additionally, we perform peer reviews for other firms across the country. As such, we have extensive knowledge and experience in this area which helps our Firm maintain sound quality control over our engagements.



REPORT ON THE FIRM'S SYSTEM OF QUALITY CONTROL

November 12, 2020

To the Shareholders of Mauldin & Jenkins, LLC
and the National Peer Review Committee

We have reviewed the system of quality control for the accounting and auditing practice of Mauldin & Jenkins, LLC (the firm) applicable to engagements not subject to PCAOB permanent inspection in effect for the year ended May 31, 2020. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants (Standards).

A summary of the nature, objectives, scope, limitations of, and the procedures performed in a System Review as described in the Standards may be found at www.aicpa.org/prsummary. The summary also includes an explanation of how engagements identified as not performed or reported in conformity with applicable professional standards, if any, are evaluated by a peer reviewer to determine a peer review rating.

Firm's Responsibility

The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. The firm is also responsible for evaluating actions to promptly remediate engagements deemed as not performed or reported in conformity with professional standards, when appropriate, and for remediating weaknesses in its system of quality control, if any.

Peer Reviewer's Responsibility

Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review.

Required Selections and Considerations

Engagements selected for review included engagements performed under *Government Auditing Standards*, including compliance audits under the Single Audit Act, audits of employee benefit plans, audits performed under FDICIA, an audit of a broker-dealer and an examination of service organization's SOC 1 engagement.

As a part of our peer review, we considered reviews by regulatory entities as communicated by the firm, if applicable, in determining the nature and extent of our procedures.

PBMares, LLP | 725 Jackson Street, Suite 210 | Fredericksburg, VA 22401 | P 540.371.3566 | 1.800.296.3710 | F 540.371.3598

Opinion

In our opinion, the system of quality control for the accounting and auditing practice of Mauldin & Jenkins, LLC applicable to engagements not subject to PCAOB permanent inspection in effect for the year ended May 31, 2020, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)* or *fail*. Mauldin & Jenkins, LLC has received a peer review rating of *pass*.

PBMares, LLP

PBMares, LLP

Experience with EDP Systems and Extent of the Use of Audit Software in the Engagement

Mauldin & Jenkins utilizes a 100% paperless audit approach to the performance of all of our audits via the utilization of ProSystems Engagement. This software has been used by our Firm for many years and allows us to streamline the overall audit process. Additionally, standard Microsoft applications are utilized in conjunction with ProSystems; these include Word and Excel. All of our audit team members are equipped with laptop computers and are extensively trained in the use of our computer applications.

Our Bradenton office team members have extensive experience with the MUNIS Financial Management System. We have a thorough understanding of the modules within this system, specifically the account inquiry, vendor inquiry, journal inquiry, capital asset module, payroll module, and various other functions and modules within the software. We are very proficient in its use and functions and thus typically have the ability to work on our own running reports, obtaining audit documentation, etc. during the audit process. If given the access by our clients, we are able to also perform typical testing through client systems remotely from remote locations, such as our office or elsewhere. We believe that this is an efficient way to utilize the Town's resources while also not burdening Town staff with requests for information as we have knowledgeable professionals who can easily access the information through the Town's software.

The Management Advisory Services (MAS) department of Mauldin & Jenkins includes certain individuals who have had substantial training in the accounting, auditing, and use of Electronic Data Processing (EDP) Systems. To compliment these highly trained individuals, all members of the audit staff have also had significant training in computer auditing techniques. Mauldin & Jenkins uses a very detailed and structured approach in using computer auditing techniques, which has been extremely successful for us in our past engagements.

At the start of the engagement during our planning phase, we will assess the computer systems used by the Town, and plan the specific computer aided auditing techniques to be used. This will decrease time spent in initial file setup, trial balance setup, and data integrity testing. This approach will allow for more effective audits resulting in a fast sort, filter and analysis of multiple transactions in a population, and provide for drilling down on those items that have the highest risk. Examples of uses of extraction and data analysis in our audit approach are listed below:

- 1) Summarizing disbursements for a period by dollar range and compare to policy guidelines for complying with certain attributes (approvals and signature requirements, etc.);
- 2) Searching check register listings for unrecorded items or checks written during the fiscal year;
- 3) Converting bank or investment activity statements to Excel to provide for a quick listing of deposits for an entire period/year;
- 4) Converting vendor file information to Excel and comparing employee files with addresses for any similar or unusual items related to vendor files;
- 5) Analyzing general ledger detail transactions and journal entries for effective and efficient testing of all activity for the fiscal year as compared to the prior year;
- 6) Downloading trial balances, detail journals, and selected transaction files into our software through IDEA.

The trial balance downloaded will then be used to agree to the ultimate draft of the Town's financial statements ensuring that all adjustments and balances are brought forward into the financial statements and providing a clean audit trail for review and support of the Town's financial statements. Should the Town desire a need for our computer aided techniques for non-audit purposes, we would be happy to assist management with our expertise in data extraction and analysis.

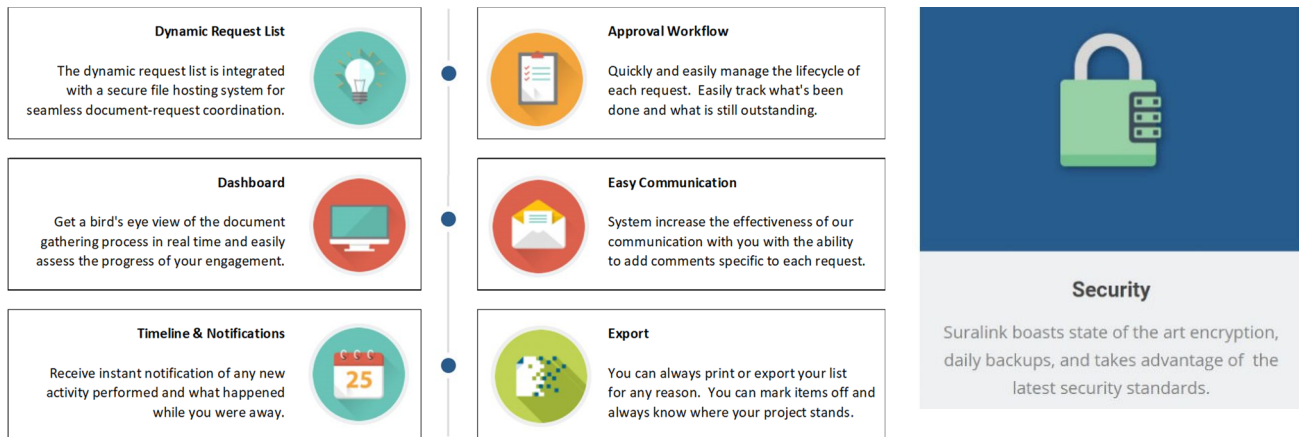
Artificial Intelligence (AI)

Mauldin & Jenkins is excited to be one the first accounting firms in the Southeast to utilize an artificial intelligence tool as part of our audit process – the AI Auditor. The AI Auditor allows for us to scan 100% of your transactions and provide new risk based insights during the audit (such as anomalous transaction patterns found). These risk based insights can be opportunities to correct mistakes or point to areas where there may be malicious activity. As part of our audit methodology, AI systems are becoming what sampling used to be. Sampling was a coping mechanism for big data; the new coping mechanism for big data is Artificial Intelligence (AI). As the amount of data in all audits increase, tools like these are more and more necessary to ensure we can provide you the highest quality audits and advice.

Workflow Software and Ability to Work in Remote Environment

In addition to the usage of technology above, our Firm uses the workflow management tool called Suralink. This platform combines a dynamic and digital client assistance list, assignment workflow, and secure file hosting to deliver a more efficient and organized engagement for our clients and audit team. For the first time, everyone involved in the engagement will have a real time view of the document collection process.

Suralink features include:



In addition to the above accumulation of information electronically via the use of Suralink, Mauldin & Jenkins is very effective in working from a remote environment if requested or necessary. In prior audits, our governmental clients have allowed us read-only access to their systems and we are able to run reports, view purchase orders, invoices, reconciliations, etc. with this access. Our staff are very accustomed to working in this manner to reduce the overall disruption the annual audit otherwise could create for our clients. This has become even more important during the pandemic situation to continue to be able to serve our clients while not being able to physically be with our clients.

Computer Assistance Capability

All of our 47 Bradenton office team members have extensive experience with clients utilizing various accounting softwares. We have a thorough understanding of these systems and use of the account inquiry, utility billing, cash management, and various other functions and modules within these different governmental softwares. We are very proficient in its use and functions and thus typically have the ability to work on our own running reports, obtaining audit documentation, etc. during the audit process. If given the access by our clients, we are able to also perform typical testing through client systems remotely from remote locations, such as our office or elsewhere. We believe that this is an efficient way to utilize the Town's resources while also not burdening Town staff with requests for information as we have knowledgeable professionals who can easily access the information through the Town's software.

Ability to Furnish Required Services

Audit Methodology

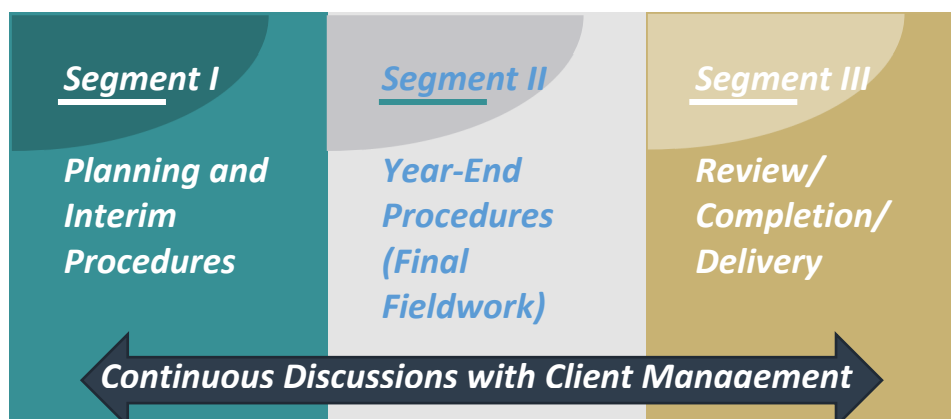
Our audit of the financial statements will be conducted in accordance with auditing standards generally accepted in the United States of America and will conform to the standards as set forth in the following:

- “Generally Accepted Auditing Standards” developed by the American Institute of Certified Public Accountants (AICPA).
- *Government Auditing Standards* issued by the Comptroller General of the United States (also referred to as “Yellow Book”).
- Audits of State and Local Governmental Units issued by the American Institute of Certified Public Accountants.
- Single Audit Acts Federal and State of Florida.
- The Uniform Guidance, OMB Circular A-133 and other applicable OMB Circulars.
- Sections 11.45 and 218.39 of the Florida Statutes.
- Regulations of the State of Florida Department of Financial Services.
- Rules of the Auditor General and other Florida agencies as relevant.

Tailored Approach – For each engagement we begin with a detailed audit plan based on our detailed understanding of the Town’s policies, procedures, and risk areas. We obtain this understanding through the performance of walkthroughs and internal control documentation questionnaires. We then develop audit procedures based on our engagement specific risk assessment. We use Firm manuals specifically designed for governments to develop audit programs tailored to the Town which incorporate the requirements set forth above. We anticipate that these procedures will enable us to express our professional opinion that the financial statements of the Town present fairly, in all material respects, the financial position and results of operations of the various opinion units in conformity with accounting principles generally accepted in the United States of America.

Proposed Segmentation of the Engagement

Our professionals, who are knowledgeable with respect to audit requirements for governmental entities, will be assigned based on their expertise with respect to each segment. Our audit procedures, related documentation and quality review will be segregated by each segment as follows based on our review of the Town’s prior financial statements, budgets, request for proposal, past experience, and other information available. These procedures will be applied for the annual financial statement audits.



Segment I: Planning and Interim Procedures

This segment includes:

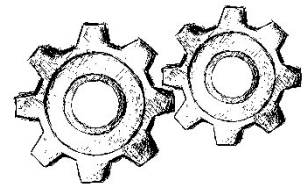


- Obtaining a signed engagement letter for the financial and compliance audit;
- Meeting with Town management to discuss the scope of the audit, timing of our work, and preparation of client schedules, and to address any concerns;
- Reviewing previously issued and interim financial reports, comment letters, monitoring reports, and other supporting workpapers;
- Reading minutes of Town meetings;
- Reviewing the Town's current year budget, as adopted and revised;
- Reviewing new debt agreements, and other various documentation;
- Updating our understanding of the Town's accounting policies and procedures, including the financial and other management information systems utilized by the Town;
- Updating our already in-depth knowledge of the Town's EDP equipment, software and systems in use;
- Performing analytical reviews to determine critical areas and assess risks;
- Performing a preliminary evaluation of the internal control structure at the account and assertion level;
- Designing and performing applicable tests of controls related to the financial statements and internal accounts;
- Making fraud inquiries and assessing the risks of material misstatement;
- Obtaining a list of cash, investment, debt, and selected revenue accounts for confirmation purposes, as applicable;
- Determining audit strategies for balance sheet and operating statement accounts based on audit risk;
- Obtaining a preliminary Schedule of Expenditures of Federal Awards to initiate planning and internal control testing for the Single Audit;
- Preparing year-end audit programs;
- Meeting with appropriate Town personnel to discuss the results of our preliminary audit work.

Segment II: Final Audit Fieldwork Procedures

This segment includes:

- Conducting an analytical review of account balances based on closing balances;
- Testing the valuation, restrictions and cut-offs of cash and investment balances, as applicable;
- Testing receivable cut-offs and balances, including an analysis of subsequent receipts;
- Reviewing and testing supporting documentation for the allowance for doubtful accounts, prepaid items and other assets;
- Vouching capital asset additions and deletions, analyzing charges for appropriate accounting and testing depreciation;
- Testing accounts payable cut-offs and balances, including an analysis of subsequent disbursements;
- Testing accrued payroll, compensated absences, OPEB payable, and other accrued liability cut-offs and balances;
- Testing debt balances and debt covenant compliance, if applicable;
- Testing compliance with applicable laws and regulations;
- Testing the classification of net position (unrestricted, restricted and net investment in capital assets);
- Performing analytical procedures and substantive testing of revenues and expenditures/expenses;
- Obtaining and auditing the final Schedule of Expenditures of Federal Awards;



- Completing compliance tests for the major programs selected for testing as required by the Federal Single Audit Act, as applicable;
- End of fieldwork exit conference.

Segment III: Review, Completion and Delivery Procedures

This segment includes:



- Reviewing workpapers to ensure quality and thoroughness of audit procedures;
- Summarizing the results of audit procedures;
- Obtaining attorney letters;
- Evaluating commitments, contingencies and subsequent events;
- Proposing audit adjustments;
- Summarizing and evaluating passed audit adjustments;
- Evaluating compliance exceptions;
- Reviewing draft financial statements and related note disclosures;
- Performing financial condition assessment procedures;
- Preparing drafts of audit reports and management letter;
- Delivering drafts of audit reports and letters to appropriate client officials;
- Finalizing all reports and management letter;
- Obtaining signed representation letter and the Town's approval of the final financial statements;
- Drafting the Data Collection Form and obtaining the Town's approval;
- Preparing and providing the Town a PDF document and "camera ready" copy of the audited financial statements;
- Final exit conferences and presentations with appropriate Town officials.

Following the completion of the audit, we will provide written draft reports to management for review and approval including the following:

- An independent auditor's report on the fair presentation of the Governmental Activities and Major Fund, which collectively comprise the Town's basic financial statements in conformity with generally accepted accounting principles, including an opinion on the fair presentation of the supplementary information and the Schedule of Expenditures of Federal and State Awards "in relation to" the audited financial statements, if applicable.
- An independent auditor's report on internal control over financial reporting and on compliance and other matters based on an audit of financial statements performed in accordance with *Government Auditing Standards*, which will include any reportable conditions.
- An independent auditor's report on compliance for each major program and on internal control over compliance required by OMB Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards and Chapter 10.550, Rules of the Auditor General, of the State of Florida. These reports will include any reportable conditions or instances of noncompliance.
- A management letter that outlines any constructive suggestions for improvement to management.
- Any comments required by the Rules of the Auditor General, Chapter 10.554(1)(i).
- Acknowledgement and communication surrounding Statement of Auditing Standards (SAS) No. 114, *The Auditor's Communication with Those Charged with Governance*. We will provide, as required, communications to management on each of the following:
 - Our responsibility, as your auditors, under auditing standards generally accepted in the United States of America.
 - Accounting policies.
 - Management's judgments and accounting estimates.

- Financial statement disclosures.
- Related accounting matters.
- Significant difficulties encountered in performing the audit.
- Audit adjustments.
- Disagreements with management.
- Representations from management.
- Management consultation with other accountants.
- Significant issues discussed with management.
- Other information in documents containing audited financial statements.
- Independence.

Level of Staff and Number of Hours to be Assigned

Based on the Town's request for proposal, we have also prepared a schedule of events, including level of staff and number of hours to be assigned to each proposed segment of the engagement, which is representative of the expected 2023 audit in the following tabular presentations:

Segmented Hours by Staff Level				
Segments	Engagement Team Members by Level			
	Partner	Manager	Staff	Total
Segment I - Planning and Interim Procedures	10	10	10	30
Segment II - Final Audit Fieldwork Procedures	10	50	50	110
Segment III - Review, Completion and Delivery Procedures	20	20	20	60
Total Engagement	40	80	80	200

Type and Extent of Analytical Procedures to be Used in the Engagement

Analytical procedures can be applied to almost every financial statement balance in accordance with U.S. Generally Accepted Auditing Standards. It is, therefore, an efficient audit strategy to employ analytical procedures to the maximum extent possible. Analytical procedures may augment substantive tests of details depending on our overall risk assessment of Town accounts.

The elements of analytical procedures we plan to consider are as follows:

1. Identify the factors on which a given accounting result should depend;
2. Determine the approximate relationship between the accounting result and those underlying factors;
3. Predict what the current results should be if that relationship continued;
4. Compare the actual current result to the prediction;
5. Investigate and corroborate significant variances between the actual result and the prediction;
6. Reach a conclusion as to the reasonableness of the reported result.

Types of analytical procedures employed will include:

- Reviewing changes from prior years for reasonableness;
- Reviewing accounts for items larger or smaller than expected when compared to budgets or forecasts;
- Reviewing and comparing logical relationships between years (e.g., payroll taxes and benefits to wages, etc.). Comparisons between years can be made more effective when logical relationships between elements of the financial statements that would be expected to conform to the predictable pattern are used to develop trends. This is primarily accomplished through the use of ratios;
- Analyzing and comparing nonfinancial information, such as number of taxable properties, geographical area, number of employees, etc.

All analytical procedures performed as substantive tests are documented on each applicable audit program.

Approach to be taken to Gain and Document an Understanding of the Town's Internal Control Structure

For purposes of an audit of the financial statements and statutory, regulatory and contractual compliance, the Town's control structure consists of the following five elements as they relate to the Town's ability to conduct operations and use resources in accordance with management's authorization and consistent with laws, regulations, contracts and policies, and to record, process, summarize, and report financial data consistent with assertions embodied in the financial statements: (1) the control environment; (2) risk assessment; (3) control activities; (4) information and communication processes/systems; and (5) monitoring. The internal control structure and its policies and procedures are an important source of information about the types and risks of potential material misstatements that could occur in the financial statements and violations of statutory, regulatory and contractual requirements. This information is essential for effective audit planning and in designing effective and efficient audit tests.

In our understanding of the Town's internal control structure, we will obtain knowledge about:

- How internal control structure policies, procedures and records are designed;
- Whether internal control structure policies, procedures and records have been placed in operation, i.e., whether the Town is using them;
- Whether internal control structure policies, procedures and records are designed effectively, i.e., whether they are likely to prevent or detect material misstatements or compliance violations on a timely basis;
- Whether internal control structure policies, procedures and records are operating effectively.

Auditing standards generally accepted in the United States of America require the auditor to document our understandings of the internal control structure elements. The form and extent of documentation is flexible. Generally, the more complex an entity's internal control structure and the more extensive the procedures performed to obtain the understanding, the more extensive our documentation should be. In addition to memos, we plan to use specific designed forms and questionnaires to document our understanding of the internal control structure. Recent changes in auditing standards, known as the risk assessment standards, denote that the auditor is not required to test internal control so as to rely on them to reduce other test work, but do not allow for only inquiry procedures related to internal control. We are required, and will perform, other procedures, such as walkthroughs and observation, related to controls over significant financial statement and audit assertions.

Approach to be taken in Determining Laws and Regulations to be Subject to Audit Test Work

Standards for testing and reporting on compliance with laws and regulations are established by Auditing Standards AU-C Section 935, *Compliance Audits*. We will use this guidance to perform tests to determine the Town's compliance with certain provisions of laws and regulations (Florida Statutes, etc.), contracts, grant agreements, and debt agreements, where noncompliance could have a *direct and material effect* on the financial statements.

Our approach to be taken to determine the laws and regulations that will be subject to audit test work will include procedures designed to identify requirements found in legal or legislative data, administrative regulations, and documents associated with grant and contract arrangements. The following procedures and policies will be applied depending on the nature and materiality of the laws and regulations:

- During the planning phase, the type of audit to be performed, as it relates to compliance matters, will be communicated to all personnel assigned to the engagement.
- Obtain a list of all federal award programs from which the client received and expended funds and identify, using the prescribed risk-based approach, the major programs required to be audited. If a program-specific audit is required, identify the award program to be audited.
- Identify applicable state and local statutory and regulatory requirements and contractual requirements.
- Plan and document the audit procedures to be performed relative to material state and local statutory and regulatory requirements and contractual requirements.
- Perform and document federal, state, and local statutory, regulatory and contractual compliance audit procedures as deemed to be applicable and appropriate during the planning stage of the engagement.
- Make specific inquiries of management concerning the following matters:
 - The Town's compliance with laws and regulations.
 - The Town's policies relative to the prevention of statutory, regulatory and contractual violations.
 - The use of directives issued by the Town and periodic representations obtained by the Town from officials and other management personnel at appropriate levels of authority concerning compliance with laws and regulations.
- Specific testing for issues that are unique to Florida governments:
 - Testing as to whether or not the Town complied with Section 218.415, Florida Statutes, regarding the investment of public funds.
 - Testing as to the Town's compliance with Section 166.241, Florida Statutes, regarding adoption and reporting of annual budget, such as the minimum information required to be included in the budget, when the budget must be posted on the Town's website after adoption, requirements on posting budget amendments.
 - Testing of debt covenant compliance requirements.
 - Testing of the financial condition assessment procedures pursuant to Sections 10.554(1)(i)7.c. and 10.556(7), Rules of the Auditor General, of the State of Florida, and determination as to whether or not the Town has met one or more of the conditions described in Section 218.503(1), Florida Statutes and Chapter 2012-38, *Laws of Florida*.

Approach to be taken in Drawing Audit Samples for Purposes of Tests of Compliance

Applicable auditing standards state that, in testing for compliance with laws and regulations, the number, selection, and testing of transactions is based on the auditor's professional judgment. None of the guidelines, primarily AU-C Section 250, explain whether this requirement to select a representative number for testing compliance means that audit sampling is necessary.

The two possible approaches to audit sampling are nonstatistical and statistical. AU-C Section 530, *Audit Sampling*, indicates that both of these approaches are capable of producing sufficient evidential matter, if properly applied. The types of procedures that are applied are not determined by the sampling approach used. Either approach may be used to apply whatever tests of details deemed necessary in the circumstances. The importance of professional judgment cannot be overemphasized as it applies to the evaluation of the adequacy of evidential matter generated by the sampling approach. Regardless of the sampling approach selected, we will properly plan, perform, and evaluate the results of the sample. Professional judgment must be used to relate the sample results to other evidential matter when we form a conclusion about compliance with laws and regulations. It should be noted, however, that not all tests of compliance or controls are transaction related. If we decide to use audit sampling, attention is focused on which sampling approach (statistical or nonstatistical) to use. Substantial information is given in the AICPA Sampling Guide and several college and professional books on the use of various statistical sampling approaches.

The basic requirements that relate to all compliance related samples, statistical and nonstatistical, are as follows:

- **Planning.** We will relate the population to the objective of the audit test; i.e., defining the population and sampling unit.
- **Selection.** We will select items that can be expected to be representative of the population.
- **Evaluation.** We will project sample results to the population and consider sampling risk.

In a compliance sampling application, the population is defined as all items that constitute the account balance or class of transactions, or the portion of the balance or class, being tested (i.e., all expenditures of the Town above a certain threshold required to be bid). The population for a substantive sample usually is the account balance or class of transactions excluding those items selected for testing because of individual significance. The term individually significant item encompasses two types of items:

- Individually significant dollar items.
- Unusual items (that is, items that have audit significance by their nature).

Due to the nature of tests of controls or compliance, we ordinarily are not concerned with identifying individually significant items when tests of controls or compliance are performed using audit sampling. Sampling results can be projected only to the population from which the sample is drawn. The use of the wrong population for a sampling application could mean that conclusions based on the sample are invalid for our purpose.

The sampling units are the individual items that are subjected to tests and that represent the components of the population. It is important to properly identify the sampling unit before the sample is selected to produce an efficient and effective sampling application. Examples of sampling units would be individual capital disbursements, etc. The determination of the specific sampling unit is influenced by the following considerations:

- The sampling unit should produce an efficient sampling plan.
- The sampling plan must be effective to accomplish its objectives.
- The nature of the audit procedures can determine the sampling unit to be used. AU-C Section 530 requires a “representative sample”. There are several commonly used methods of selecting samples that meet the criteria of representativeness stipulated by AU-C Section 530. The following are some of those methods: random (can be statistical or nonstatistical), systematic (can be statistical or nonstatistical), or haphazard (nonstatistical).

We will evaluate whether the sample selected seems representative of the population to be tested. If the sample does not seem representative, we would reselect. For all items in the population to have a chance to be selected, we will determine that the sample population actually includes all the items (e.g., capital disbursements, etc.) comprising the balance. There are many ways to determine the completeness of a sample population, including:

- If the sample is selected from a trial balance, we can foot the trial balance and reconcile the total to the account balance.
- If the items are numerically sequenced, we can scan the accounting records to account for the numerical sequence of items in the population and select the sample from that sequence.

The two sampling forms presented both include a step that allows the auditor to document how the completeness of the sample population was considered. Whenever practical, we will consider using random selection (with a random number table or microcomputer-generated numbers) or systematic selection. Haphazard selection may be used when the population is not numbered or when other circumstances make use of a random-based method impractical. Using one of these random-based methods does not make the sampling application statistical.

The evaluation of sample results has two aspects. We will need to project the noncompliance. Also, we will need to consider the sampling risk. In a statistical sample, sampling risk must still be considered and restricted to a relatively low level but cannot be objectively measured. This is the primary conceptual distinction between statistical and nonstatistical sampling. In the two nonstatistical sampling approaches presented in this section, sampling risk is assessed by considering whether the rate or amount of exceptions identified in the sample exceed the expected rate or amount of exceptions used in designing the sample.

Sampling Techniques and the Extent to Which Statistical Sampling Will be Used in the Engagement

Our approach is evolving to utilize artificial intelligence tools to scan entire populations and is fast eliminating the need for sampling. In some situations, sampling will still be necessary or required. When we utilize audit sampling, we do so as provided in U.S. Auditing Standards AU-C Section 530, *Audit Sampling*. We would plan to utilize audit sampling whenever a decision is made to apply a specific audit procedure to a representative sample of items within the account balance or class of transactions with the objective being reaching a conclusion about the entire balance or class.

We anticipate using audit sampling on the following types of audit tests:

- Substantive tests of details of balance sheet account balances;
- Substantive tests of details of transactions;
- Tests of controls;
- Tests of compliance with laws and regulations.

Our use of audit sampling will be based on the guidance in AU-C Section 530 and the AICPA Audit and Accounting Guide - Audit Sampling.

Assistance with GASB Pronouncements

GASB has issued over 60 pronouncements in the past 20 years, and continues to research various projects of interest to governmental units. Subjects of note for upcoming implementation include:

- Compensated Absences;
- Accounting Changes and Error Corrections;
- Certain Credit Risk disclosures;
- Financial Reporting Model;
- Capital Asset Reporting.

Considering the number of recently issued or pending GASB pronouncements, we believe proactive training on the parts of auditors and auditees to be of great importance. As in the past with our governmental clients (via free CPE and general discussions), our priority is to communicate all significant information to our clients and offer special training sessions relative to these subjects.

Methodology to be Used in Performing the “Risk Based” Approach in Determining Major Federal Programs

The Uniform Guidance of 2 CFR 200 (the “Uniform Guidance”), which replaced OMB Circular A-133 in implementing the audit requirements of the Single Audit Act, states that the auditor should use a risk-based approach to determine which federal programs are major programs. The Uniform Guidance also places the responsibility for identifying major programs on the auditor and provides criteria for the auditor to use in applying a risk-based approach. In evaluating risk, we will utilize the prescribed approach which considers, among other things:

- The current and prior audit experience with the Town.
- Oversight by the federal agencies and pass-through entities.
- Changes in personnel or systems.

We will utilize Firm governmental manuals and the Uniform Guidance to apply the risk-based approach as illustrated in the following steps:

- We will obtain the government’s schedule of expenditures of federal awards identifying each program/cluster.
- We will identify the programs/clusters with expenditures that meet the dollar threshold for Type A.
- We will perform risk assessment of the Type A programs/clusters to determine if any are low-risk programs and if they are not low-risk, they will be identified as major programs under the risk-based approach.
- For programs/clusters with expenditures that do not meet the dollar threshold for Type A, they will be identified as Type B programs and evaluated as to whether each Type B has expenditures that meet the dollar threshold for risk assessment and whether the Type B is considered a high-risk program.
- The total dollar amount of major programs determined in steps 3 and 4 above will be compared to the total federal expenditures to ensure the appropriate coverage is obtained. The major program expenditures must be at least 20% of total federal expenditures if the Town is deemed a low-risk auditee and at least 40% if the Town is not considered low-risk.

The standards allow for the risk criteria described above to be waived in the first year after a change in auditors. Exercising the waiver would result in all Type A programs/clusters being audited as major programs. We would consider this option and compare the major program determination using this method to that of the risk-based approach in performing the Single Audit of the Town for the first year a Single Audit is required.

Identification of Anticipated Potential Audit Problems

Single Audits

Single Audits can be quite cumbersome – especially during a time when new programs are being created and new funding streams are available from the federal government. Since 2020, we have seen a significant amount of new federal funding made available via the Coronavirus Aid, Relief, and Economic Security Act (“CARES”), the Omnibus Appropriations and Coronavirus Relief Package, the American Rescue Plan Act, and most recently, the Infrastructure Investment and Jobs Act.

Obtaining the needed information from a compliance and financial perspective can be difficult for the auditor and auditee. We anticipate similar difficulties in performing the audit of the Town if a Single Audit is required. However, we do believe that with proper planning and communication by all sides, and with the assistance of Town personnel, all potential problems should be easily overcome.

The Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (**the Uniform Guidance**), entails more than 100 pages of regulations in applying for, managing, and auditing federal grants and cooperative agreements. The Uniform Guidance includes many complex requirements for you as the auditee to adhere to – including those related to procurement (which seemingly continue to evolve), sub recipient monitoring, and indirect costs. We have a very good understanding of both the auditor and grant recipient requirements of the Uniform Guidance and are available to assist you in adhering to the provisions thereof.

Additionally, we are active members of the AICPA’s Government Audit Quality Center (GAQC) which continues to provide significant updates and guidance to the funding created by the federal government in response to the COVID-19 pandemic. As members of the GAQC, we have direct access to the information as soon as it is made available and can be a valued resource to the Town as a recipient of any of this new funding.

Other Potential Problems

In addressing any issue, communication and timely resolution are critical. Mauldin & Jenkins prides itself in developing professional relationships and rapport with clients which facilitate open and honest communication. Mauldin & Jenkins’ stance would be based on reporting meaningful information to the financial statement users, but understanding that the financial statements are the Town’s representations. To do less would compromise our independent status.

We use the following approach to seek a mutually agreeable resolution of accounting and reporting issues:

- | | |
|---------------|---|
| Step 1 | Define and understand the issue through discussion with the Town’s management and verified audit information. |
| Step 2 | Make an initial assessment of the impact of alternative accounting treatments. |
| Step 3 | If the impact has significant potential, gather research which may include the following: obtain the Town’s research and rationale for their position; gather additional details; draw on common practices within other similar sized governments; utilize recognized Firm experts. |
| Step 4 | Discuss with Town staff the Firm’s preferred position and rationale. |
| Step 5 | Resolve the issue. |

Process to Produce a Meaningful Management Letter

A written Management Letter containing matters not required to be included in the auditor's report on compliance and on internal control over financial reporting will be prepared and presented to Town Commission at the conclusion of each audit. Mauldin & Jenkins believes that the Management Letter is the most important way that the Town can learn of any matters that can improve the Town's financial reporting. During the planning phase, the commitment to develop a truly effective Management Letter is communicated with the engagement team. If there are areas for improvement that have already been identified, they are discussed at this time. Also, Management Letter point memo is created and available for all engagement team members to document potential issues. As issues are identified in the memo, the engagement manager will evaluate the issues and discuss with Town management those determined to be significant. Once all items have been discussed with management and any potential issues resolved, a draft of the Management Letter will be prepared. The Management Letter draft will be provided to the Town prior to issuance.

Availability of Personnel

As indicated throughout our proposal, we have extensive experience serving entities like the Town of Manalapan. We have a significant group of dedicated professionals who only serve this area. As such, we have numerous clients with various year-ends across the Firm and southeastern U.S. While we currently believe that we have the resources needed to perform your audit locally in our Bradenton and Sarasota Florida offices, if we were to ever need additional resources, we have the ability to draw from our entire Firm to ensure that your work gets done timely and professionally. With proper planning we believe we can easily incorporate your audit of approximately 200 hours into our 2023/2024/2025 audit timeline and schedule.

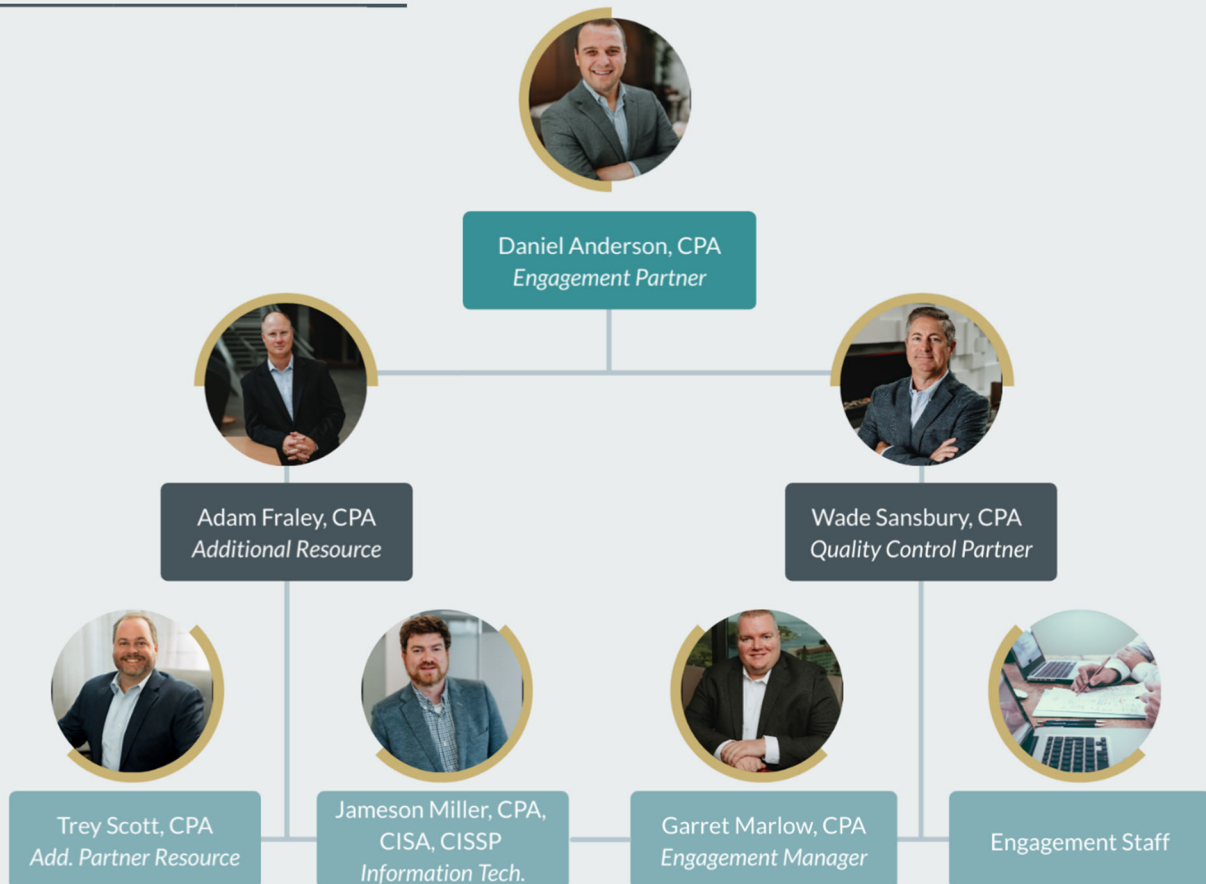
Proposed Contract Team

In order to provide the highest quality service in the most cost-efficient manner, Mauldin & Jenkins has formed a client service team which will function as a cohesive unit and would represent a superb assortment of talent and experience for the audit of the Town. As noted previously, the Firm has over 500 professionals within the Firm and approximately 45 individuals in our Bradenton office location. All of which are available to serve the Town during the course of this engagement. The proposed audit unit would be assembled as follows:

Team Member Name	Engagement Performance Roll	Years of Experience
Daniel Anderson, CPA	Engagement Lead Partner	15
Wade Sansbury, CPA	Engagement Quality Assurance Partner	28
Adam Fraley, CPA	Engagement Supporting Partner Partner	27
Jameson Miller	IT Consultant	14

Your Audit Team

ORGANIZATIONAL CHART



The above team dedicated to audit the Town will include (at a minimum): two partners, one manager, and at least one staff professional and will be fully staffed from our Bradenton, Florida office location. The manager and staff professional(s) will be substantially on-site full-time throughout the conduct of their role in the audit. Other governmental audit professionals will be available to assist throughout the fieldwork and the preparation of the financial reports. The engagement lead partner will correspond with Town management on financial reporting, audit and related issues on an ongoing basis, and this individual will also be dedicated to serve the Town throughout fieldwork, reporting and conclusion in all respective fiscal years. Mauldin & Jenkins has the depth of resources which allows us to provide you with significant resources of knowledgeable professionals to meet your deadlines.

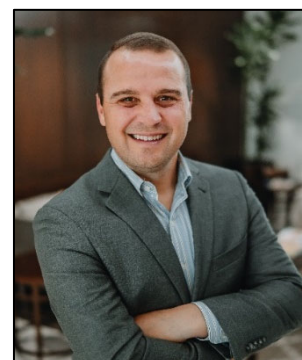
Individual Resumes of Key Personnel

Please see the following pages for resumes on key individuals who are slated to serve and who are available to serve the Town during the audit process.

Daniel Anderson, CPA

Partner
Bradenton, Florida

941-741-2213
danderson@mjcpa.com



Daniel Anderson is a partner and a Certified Public Accountant with Mauldin & Jenkins. He is registered and licensed to practice in the State of Florida. Daniel works exclusively in the governmental sector of the Firm's audit practice. Daniel has approximately 15 years of experience serving governmental clients including audit services for cities, counties, school districts, and other entities. Daniel has significant experience with his client's computer systems. This includes specific experience with remote auditing via web access to client information. Daniel will have the overall engagement responsibility for the Town engagement including planning, developing the overall audit approach, supervision of staff, and will be a main contact point for the Town. As the auditor in-charge of the overall audit of the Town, Wade meets the educational requirements under *Government Auditing Standards* and Florida Statutes. Daniel's Florida license number is AC42735 and is currently active through December 31, 2025.

Technical Experience

During his career, Daniel has served numerous governmental clients on behalf of the Firm including 20 municipalities. A condensed listing of Florida governmental audit clients served by Daniel is listed below:

Municipalities

- 1) Apopka
- 2) Atlantis
- 3) Clewiston
- 4) Crystal River
- 5) Fernandina Beach
- 6) Gulf Stream
- 7) Hallandale Beach
- 8) Islamorada
- 9) Jupiter Inlet Colony
- 10) Jupiter Island
- 11) Lake Placid

Municipalities

- 12) Longboat Key
- 13) Marco Island
- 14) Naples
- 15) Palmetto
- 16) Plant City
- 17) Tarpon Springs
- 18) Tequesta
- 19) Wildwood
- 20) Winter Haven

Other Governmental Units

- 21) Tampa Bay Water
- 22) Seacoast Utility Authority

Other Governmental Units

- 23) Hardee Co. Industrial Development Authority
- 24) South Florida Regional Transportation Authority
- 25) Lakeland Area Mass Transit
- 26) Captiva Erosion Prevention District
- 27) Citrus Co. Mosquito Control
- 28) Englewood Water District

Professional Associations and Education

- Bachelor of Science in Accounting from Florida State University in 2008
- Certified Public Accountant licensed by the State of Florida
- Member of the American Institute of Certified Public Accountants (AICPA)
- Member of the Florida Institute of Certified Public Accountants (FICPA)
- Member of the FICPA State & Local Government Committee
- Member of the Florida Government Finance Officers Association (FGFOA)

Note that Daniel has many years of experience preparing financial statements in accordance with GASB 34 as well as preparing Annual Comprehensive Financial Reports meeting all of the requirements of the GFOA Certificate of Excellence Program (this includes those clients who have successfully received the certificate on a first-time submission).

Audit Training

Daniel annually exceeds the professional standards requirements requiring 80 hours of CPE every two-year period and GAGAS standards requiring at least 24 hours of CPE that directly relates to government auditing, the government environment, or the specific or unique environment in which the audited entity operates. He attends annual Firm sponsored governmental accounting and auditing updates, as well as Single Audit updates, the FGFOA conference, AICPA sponsored courses, and various other courses. Additionally, Daniel has served as an instructor at Firm sponsored CPE events, as well as FGFOA events at the state and local level. Daniel is a graduate of the FICPA Emerging Leaders Program (2017) as well the Leadership Manatee Program (2018). Listed below are just some of the training courses Daniel has attended over the last few years:

- 2023 M&J Governmental Conference – Participant and Instructor – 16 credit hours
- 2023 FICPA Ethics: Protecting the Integrity of Florida CPAs – 4 credit hours
- 2023 M&J Single Audit Training – Instructor – 16 credit hours
- 2023 Octane Conference – Instructor – 2 credit hours
- 2023 FGFOA Gulf Coast Chapter – Instructor – GASB 96 – 2 Credit Hours
- 2022 M&J Governmental Conference – Participant and Instructor – 14 credit hours
- 2022 Octane Conference – Instructor – 2 credit hours
- 2022 FICPA Nonprofit Conference – Single Audit Update – Instructor – 1 credit hour
- 2021 FGFOA Webinar – Coronavirus State & Local Fiscal Recovery Funds – Instructor – 2 credit hours
- 2021 FGFOA School of Governmental Finance – Instructor – 2 credit hours
- 2021 FICPA State and Local Government Conference – 14 credit hours
- 2021 FICPA Ethics: Protecting the Integrity of Florida CPAs – 4 credit hours
- 2021 M&J Governmental Conference – Participant and Instructor – 13.5 credit hours
- 2021 FGFOA Conference – 8 credit hours
- 2020 M&J Governmental Conference – 12 credit hours
- 2020 AICPA National Governmental Conference – 12 credit hours
- 2020 FGFOA Webinar Instructor – GASB 84 Fiduciary Activity Implementation

Wade Sansbury, CPA

Partner
Bradenton, Florida

941-741-2255

wsansbury@mjcpa.com



Wade Sansbury is a partner and a Certified Public Accountant with Mauldin & Jenkins. He is registered and licensed to practice in Florida and Georgia. Wade is a partner who works exclusively in the governmental sector of the Firm's audit practice. Wade has over 25 years of experience serving governmental clients similar in nature to the Town. His experience has included serving cities, counties, schools and special districts. His experience also includes serving entities with significant utility operations (including water and sewer, gas, refuse, and electric services). Wade will serve as the Town's Quality Assurance Partner. Wade's Florida license number is AC45811 and is currently active through December 31, 2025.

Technical Experience

During his career, Wade has served numerous governmental clients on behalf of the Firm. On the following page is a partial listing of governmental clients served by Wade in the capacity of engagement partner in-charge or quality assurance review partner.

Cities

- 1) Albany
- 2) Apopka
- 3) Arcadia
- 4) Beaufort
- 5) Callaway
- 6) Clewiston
- 7) Conyers
- 8) Cooper City
- 9) Cordele
- 10) Covington
- 11) Crystal River
- 12) Decatur
- 13) Destin
- 14) Fernandina Beach
- 15) Fort Myers Beach
- 16) Griffin
- 17) Haines City
- 18) Hallandale Beach
- 19) Islamorada
- 20) Lake Placid
- 21) Longboat Key
- 22) Marco Island
- 23) Milledgeville
- 24) Morrow

- 25) Milton
- 26) Monrow
- 27) Naples
- 28) North Port
- 29) Palmetto
- 30) Pensacola
- 31) Pinecrest
- 32) Plant City
- 33) Roswell
- 34) Sandy Springs
- 35) Social Circle
- 36) Tarpon Springs
- 37) Tequesta
- 38) Union City
- Counties**
- 39) Liberty County
- 40) Lumpkin County
- 41) Henry County
- 42) Taylor County
- 43) Rockdale County
- 44) Sumter County
- 45) Clayton County
- 46) Bibb County
- 47) Dougherty County
- 48) Toombs County

- 49) Monroe County
- 50) Stephens County
- 51) Forsyth County
- 52) Walton County
- 53) Moore County, SC
- 54) Hernando County, FL
- 55) Union County, FL
- Boards of Education**
- 56) Highlands Co. School District
- 57) Lee Co. School District
- 58) Forsyth Co. BOE
- 59) Gwinnett Co. BOE
- 60) Henry Co. BOE
- Other Governmental Units**
- 61) Tampa Bay Water
- 62) Hardee Co. Industrial Development Authority
- 63) Ocean Highway and Port Authority
- 64) South Florida Regional Transportation Authority
- 65) Lakeland Area Mass Transit
- 66) Captiva Erosion Prevention District

Professional Associations and Education

- Bachelor of Business Administration in Accounting from Valdosta State University in 1995
- Certified Public Accountant licensed by the States of Florida and Georgia
- Member of the American Institute of Certified Public Accountants (AICPA)
- Member of the Florida Institute of Certified Public Accountants (FICPA)
- Member of the Government Finance Officers Association (GFOA)
- Member of the Florida Government Finance Officers Association (FGFOA)

Wade is currently serving as the Firm's Bradenton office managing partner and is the Firm's lead governmental partner in the State of Florida. He is also a past member of the Firm's seven-member Executive Committee, which governs the actions and directions of the Firm. Wade also currently serves on the Bradenton Area EDC Investor Relations Committee and does volunteer work with the Boy Scouts. Wade is also on the Firms Technology Committee which helps to oversee the Firm's usage of technology and the application of that technology in the audit practices. Note that Wade has many years of experience preparing financial statements in accordance with GASB 34 as well as preparing Annual Comprehensive Financial Reports meeting all of the requirements of the GFOA Certificate of Excellence Program (this includes those clients who have successfully received the certificate on a first-time submission). Wade also has extensive experience with multiple client computer systems and software and is a leader in the Firm for auditing such areas.

Audit Training

Wade annually exceeds the professional standards requirements requiring 80 hours of CPE every two-year period and GAGAS standards requiring at least 24 hours of CPE that directly relates to government auditing, the government environment, or the specific or unique environment in which the audited entity operates. He attends annual Firm sponsored governmental accounting and auditing updates, as well as Single Audit updates, the FGFOA conference, AICPA sponsored courses, and various other courses. Wade has additionally volunteered as instructor for various FGFOA Chapter training courses across the state. Listed below are just some of the training courses Wade has attended over the last few years:

- 2023 AICPA Single Audit Quality Update – 2.5 credit hours
- 2023 AICPA Performance Audits Under Yellow Book – 4 credit hours
- 2023 AICPA Audits of State and Local Governments Update – 17 credit hours
- 2023 M&J Governmental Conference – Participant and Instructor – 16 credit hours
- 2023 FICPA Ethics: Protecting the Integrity of Florida CPAs – 4 credit hours
- 2022 FICPA State and Local Government Accounting Conference – 16 credit hours
- 2022 M&J Governmental Conference – Participant and Instructor – 14 credit hours
- 2022 Coronavirus State & Local Fiscal Recovery Fund (Final Rule) – 1.5 credit hours
- 2021 Government Accounting & Auditing Conference – 6.5 credit hours
- 2021 FICPA State and Local Government Conference – 14 credit hours
- 2021 AICPA Understanding the Independence Implications of the New State and Local Government Affiliates Ethics Interpretation – 2 credit hours
- 2021 FICPA Ethics: Protecting the Integrity of Florida CPAs – 4 credit hours
- 2021 M&J Governmental Conference – Participant and Instructor – 13.5 credit hours
- 2021 AICPA Real-World Frauds in Government – 4 credit hours
- 2021 AICPA Major Firms Group Meeting – Participant – 5.5 credit hours
- 2020 Advanced Fraud Techniques – 6 credit hours
- 2020 M&J Governmental Conference – Participant – 6 credit hours
- 2020 AICPA COVID-19 Audit Implications – 2 credit hours
- 2020 National AICPA Governmental Update Conference – Participant – 17 credit hours

Adam Fraley, CPA

Partner
Atlanta, Georgia

770-955-8600
afraley@mjcpa.com



Adam Fraley is a partner and a Certified Public Accountant with Mauldin & Jenkins specializing in serving local and state governmental entities. He has over 25 years of experience and is responsible for the Firm-wide governmental practice division of Mauldin & Jenkins serving governmental clients throughout the Southeast. Adam is also a member of the Firm's Executive Committee, which governs the actions and direction of the Firm. Adam would serve the Town as an additional quality assurance partner.

Adam currently serves on the Firm's Assurance (A&A) Committee, leading the establishment of audit policies of the Firm and answering technical questions for the Firm's governmental partner group as well as other partners. He is also the Firm's Designated Audit Quality Partner (DAQP) for the AICPA's Government Audit Quality Center. He has served as Chairman on the Firm's Partner Advisory Board and Leadership and Career Development Committee, helping provide policy and procedural recommendations to establish and monitor a leadership, educational, and mentoring programs for the development of the Firm's human resources.

Note that Adam has many years of experience preparing financial statements in accordance with GASB 34 as well as preparing Annual Comprehensive Financial Reports meeting all of the requirements of the GFOA Certificate of Excellence Program (this includes those clients who have successfully received the certificate on a first-time submission).

Technical Experience

Adam serves both large and small governmental units and is involved in serving over 80 such governmental entities covering a wide range of cities, counties and special districts. A detailed listing of these clients served is available upon request.

Professional Associations and Education

- Bachelor of Business Administration in Accounting from Georgia College & State University in 1997
- Certified Public Accountant licensed by the State of Georgia
- Member of the American Institute of Certified Public Accountants (AICPA)
- Member of the Government Finance Officers Association (GFOA)

Adam has been a featured speaker at various governmental conferences and workshops, free CPE provided to our clients, and several internal and external conferences. Adam coordinates the annual Mauldin & Jenkins Governmental Industry Training Conference each year, which provides advanced training to experienced governmental auditors of the Firm. In his role as Chairman of the Firm's Leadership and Career Development Committee (LCDC), he also participates in providing annual instruction at the Mauldin & Jenkins LEAP conference, which introduces younger people to the various practice areas of the Firm, including the governmental practice.

Audit Training

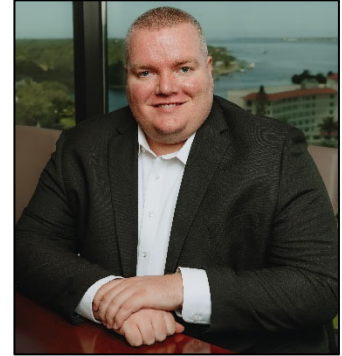
Adam annually exceeds the minimum training requirements and standards. He has many years of experience preparing financial statements in accordance with GASB 34 as well as preparing Annual Comprehensive Financial Reports meeting all of the requirements of the GFOA Certificate of Excellence Program. Listed below are just some of the training courses Adam has attended over the last few years:

- 2023 M&J Governmental Conference
- 2022 M&J Governmental Conference
- 2021 GGFOA Annual Conference Financial Statements Footnotes – Instructor
- 2021 AICPA Understanding Independence Implications of New SALG Affiliates Ethics Interpretation – Participant
- 2021 Octane Governmental Conference – Instructor
- 2021 Government Audit Quality Center Annual Update – Participant
- 2021 1st and 2nd Quarter Client Governmental Trainings – Organizer and Participant

Garrett Marlowe, CPA

Manager
Bradenton, Florida

941-741-2201
gmarlowe@mjcpa.com



Garrett is a manager and a Certified Public Accountant (2020) with Mauldin & Jenkins specializing in serving local and state governmental entities. He is registered and licensed to practice in the State of Florida. Garrett has five years of experience, all with Mauldin & Jenkins. His experience with the Firm covers a variety of state and local governmental organizations in Florida. He spends **100% of his time serving local governments** emphasizing cities and special districts. Garrett will be the senior for the Town audit responsible for the day to day audit procedures on-site with the Town. Garrett's Florida license number is AC55019 and is currently active through December 31, 2024.

Technical Experience

Garret has experience assisting in the preparation of governmental financial statements as well as preparing Annual Comprehensive Financial Reports meeting all of the requirements of the GFOA Certificate of Excellence Program. During his career, Garrett has served numerous governmental clients on behalf of the Firm. A condensed listing of governmental audit clients served by Garrett is listed below:

Cities

- | | |
|---------------------|--------------------|
| 1) Apopka | 7) LaBelle |
| 2) Clewiston | 8) Lake Placid |
| 3) Crystal River | 9) Longboat Key |
| 4) Fort Myers Beach | 10) Plant City |
| 5) Hallandale Beach | 11) Tarpon Springs |
| 6) Islamorada | 12) Wildwood |

Professional Associations and Education

- Bachelor of Science in Accounting from the University of Central Florida in 2016
- Masters of Science in Accounting from the University of Central Florida in 2017
- Certified Public Accountant licensed by the State of Florida
- Member of the American Institute of Certified Public Accountants (AICPA)
- Member of the Florida Institute of Certified Public Accountants (FICPA)

Audit Training

- 2023 M&J Governmental Conference
- 2022 M&J Governmental Conference
- 2022 Ethics and Professional Conduct for CPAs in Florida
- 2022 Thomson Reuters Audit Watch University Level 5
- 2022 M&J GASB Update
- 2021 M&J Governmental Conference
- 2021 M&J Single Audit and ACFR Training
- 2021 Thomson Reuters Audit Watch University Level 4
- 2020 M&J Governmental Conference
- 2020 Thomson Reuters Audit Watch University Level 3

Christopher Baum, CPA

Senior Associate
Bradenton, Florida

941-714-7972
cbaum@mjcpa.com



Chris Baum is a senior associate and a Certified Public Accountant with Mauldin & Jenkins. He is registered and licensed to practice in the State of Florida. Chris works exclusively in the governmental sector of the Firm's audit practice. Chris has approximately six years of experience serving governmental clients including audit services for cities, counties, school districts, and other entities. Chris has significant experience with his client's computer systems. This includes specific experience with remote auditing via web access to client information. Chris' experience includes three years with the Florida Auditor General's office. Chris' Florida license number is AC52055 and is currently active through December 31, 2024.

Technical Experience

During his career, Chris has served numerous governmental clients. A condensed listing of governmental audit clients served by Chris is listed below:

Cities

- 1) Destin
- 2) Gainesville
- 3) Gulf Stream
- 4) Jupiter Island
- 5) Naples
- 6) New Port Richey
- 7) Plant City
- 8) Sarasota

School Districts

- 9) Charlotte County
- 10) Citrus County
- 11) Clay County
- 12) DeSoto County
- 13) Flagler County
- 14) Hernando County
- 15) Manatee County
- 16) Pinellas County
- 17) Sarasota County
- 18) Union County BOE

Florida Counties

- 19) DeSoto County
- 20) Hernando County

Other Governmental Units

- 21) Peace River Manasota
Regional Water Supply
- 22) Southwest Florida Water
Management District
- 23) Hillsborough Airport
Authority

Professional Associations and Education

- Bachelor of Science in Accounting from University of South Florida in 2012
- Associate of Arts from Hillsborough Community College in 2009
- Certified Public Accountant licensed by the State of Florida
- Member of the American Institute of Certified Public Accountants (AICPA)
- Member of the Florida Institute of Certified Public Accountants (FICPA)

Audit Training

Chris annually exceeds the professional standards requirements requiring 80 hours of CPE every two-year period and GAGAS standards requiring at least 24 hours of CPE that directly relates to government auditing, the government environment, or the specific or unique environment in which the audited entity operates. He attends annual Firm sponsored governmental accounting and auditing updates, as well as Single Audit updates, the FGFOA conference, AICPA sponsored courses, and various other courses. Listed below are just some of the training courses Chris has attended over the last few years:

- 2023 M&J Governmental Conference – 16 credit hours
- 2022 FGFOA Conference – Participant – 19 credit hours
- 2022 FICPA Nature Coast Conference – 6 hours
- 2022 Compliance Supplement Update – 2 hours

- 2022 GASB 87 Leases Overview – 2 hours
- 2022 CPA Academy GASB 87 and 96 – 4.5 hours
- 2022 CPA Academy Identifying and Testing of Fraud – 5 hours
- 2021 FGFOA Conference – 18 hours
- 2021 FICPA Ethics: Protecting the Integrity of Florida CPAs – 4 credit hours

Jacob Kinsel, CPA

Manager
Bradenton, Florida

941-741-2207

jkinsel@mjcpa.com

Jacob Kinsel is a manager with Mauldin & Jenkins. Jacob works primarily in the governmental sector of the Firm's audit practice. Jacob has approximately five years of experience serving governmental clients including municipalities, special districts and pension plans. His experience covers governmental accounting and auditing and has provided audit services to numerous governmental and not-for-profit organizations. Jacob will be available to work as an additional senior for the Town audit responsible for the day to day audit procedures on-site with the Town. Jacob's Florida license number is AC57710 and is currently active through December 31, 2024. Jacob has experience assisting in the preparation of governmental financial statements as well as preparing Annual Comprehensive Financial Reports meeting all of the requirements of the GFOA Certificate of Excellence Program.



Technical Experience

During his career, Jacob has served numerous governmental clients on behalf of the Firm. A condensed listing of governmental audit clients served by Jacob is listed below:

Cities

1. Apopka
2. Hallandale Beach
3. Marco Island
4. North Port
5. Plant City
6. Islamorada

Other Governmental Units

7. Hardee Co. Industrial Development Authority
8. Lakeland Area Mass Transit District
9. North Port Firefighters' Pension Plan
10. North Port Police Officers' Pension Plan
11. South Florida Regional Transportation Authority
12. Trailer Estates Parks & Recreation District
13. Bayshore Gardens Parks & Recreation District

Professional Associations and Education

- Bachelor of Science in Accounting from University of Central Florida in 2018
- Member of the Florida Institute of Certified Public Accountants (FICPA)

Audit Training

Jacob annually exceeds the professional standards requirements requiring 80 hours of CPE every two-year period and GAGAS standards requiring at least 24 hours of CPE that directly relates to government auditing, the government environment, or the specific or unique environment in which the audited entity operates. He attends annual Firm sponsored governmental accounting and auditing updates, as well as Single Audit updates, and various other courses. Additionally, Jacob has served as an instructor and participant at Firm sponsored CPE events. Listed below are just some of the training courses Jacob has attended over the last few years:

- 2023 M&J Governmental Conference –16 credit hours

- 2023 AICPA Not-For-Profit Certificate I – 40 credit hours
- 2023 CapinCrouse National Church Virtual Seminar – Participant – 6 credit hours
- 2023 M&J Private Client Services Conference – Participant – 16.5 credit hours
- 2023 CapinCrouse National Nonprofit Virtual Seminar – Participant – 3 credit hours
- 2022 M&J Governmental Conference – Participant – 13 credit hours
- 2021 M&J Governmental Conference – Participant – 11 credit hours
- 2021 M&J Governmental In-Charge Training – Participant – 4 credit hours
- 2021 M&J LEAP Conference – Instructor – 4 Credit Hours
- 2021 Thomson Reuters Experienced In-Charge Training – Participant – 24 credit hours
- 2020 M&J Governmental In-Charge Training – Participant – 4 credit hours
- 2020 M&J LEAP Conference – Instructor – 4 Credit Hours
- 2020 Thomson Reuters In-Charge Training – Participant – 24 credit hours

Alison N. Wester, CPA, CGMA

Partner
Bradenton, Florida

941-714-7963
awester@mjcpa.com



Alison Wester is a partner and a Certified Public Accountant (2000) with Mauldin & Jenkins. She is registered and licensed to practice in Florida and Georgia and has been with the Firm since graduation from college. Alison is a partner who works with governmental entities as well as other entities within the Firm's audit practice. Alison has over 25 years of experience serving Firm attestation clients. This experience has included serving cities, special districts, and pension plans. Alison would be available to serve as a supporting resource partner to the Town. Alison's Florida license number is AC43452 and is currently active through December 31, 2025.

Technical Experience

During her career, Alison has served numerous governmental clients on behalf of the Firm including 10 municipalities, 10 special districts/authorities, and 7 pension plans. A detailed listing of these clients served is available upon request.

Professional Associations and Education

- Bachelor of Business Administration in Accounting from the University of Georgia in 1996
- Certified Public Accountant licensed by the States of Florida and Georgia
- Member of the American Institute of Certified Public Accountants (AICPA)
- Member of the Florida Institute of Certified Public Accountants (FICPA)
- Member of the Florida Government Finance Officers Association (FGFOA)

Alison has served on the Firm's Partner Advisory Board and is a current member of the Firm's Leadership and Career Development Committee. She served on the AICPA's Examination Content Subcommittee for the Financial Accounting and Reporting section of the CPA Examination. She is a current member of the AICPA's Women's Initiatives Executive Committee Task Force. Additionally, Alison is also an executive board member and treasurer for the St. Stephens Episcopal School Parents' Association in Bradenton, as well as a board member and secretary for the Excelsior Education and Training Foundation, also in Bradenton.

Audit Training

Alison annually exceeds the minimum training requirements and standards. She has many years of experience preparing financial statements in accordance with GASB 34 as well as preparing Annual Comprehensive Financial Reports meeting all of the requirements of the GFOA Certificate of Excellence Program. Listed below are just some of the training courses Alison has attended over the last few years:

- 2023 M&J Governmental Conference – 16 credit hours
- 2022 M&J Governmental Conference – Participant and Presenter – 14 credit hours
- 2021 M&J Governmental Conference – Participant – 6.5 credit hours
- 2020 M&J Governmental Conference – Participant – 6 credit hours
- 2020 Remote Audit Best Practices – Participant – 1 hour
- 2020 Internal Control and Fraud in Governmental and Nonprofits – Participant – 11 hours
- 2019 M&J Governmental Training – Participant – 16 credit hours
- 2019 M&J Governmental Conference – Participant
- 2019 FICPA Ethics: Protecting the Integrity of Florida CPAs – 4 credit hours

Trey Scott, CPA

Partner

tscott@mjcpa.com

Trey Scott is a partner and a Certified Public Accountant (2010) with Mauldin & Jenkins specializing in serving local and state governmental entities. He is registered and licensed to practice in the States of Florida and Georgia. Trey has approximately 16 years of experience, all with Mauldin & Jenkins. His experience with the Firm covers a variety of state and local governmental organizations in Florida, Georgia, and South Carolina. He spends **100% of his time serving local governments** emphasizing cities, counties and special purpose entities and authorities. Trey will be an additional resource in developing the overall audit approach and supervision of staff. Trey has significant experience with various client EDP systems. Trey's Florida license number is AC50327 and is currently active through December 31, 2025.



Technical Experience

During his career, Trey has served numerous governmental clients on behalf of the Firm. This includes **12 municipalities**, 7 counties, 4 state entities, and 11 special purpose entities. Included in the municipalities served by Trey in the past as engagement director (senior manager) are the City of Pensacola, the City of Cooper City, the City of Hallandale Beach, the City of Augusta, and the City of Charleston.

Additionally, Trey has significant experience with **federal and state grant programs**. He is one of the main review persons for the Bradenton office for Single Audit procedures. He attends significant Single Audit training each year and is responsible for teaching at Mauldin & Jenkins in-house staff training annually as well as various FGFOA events.

Professional Associations and Education

- Bachelor of Arts Majoring in Business Administration from Austin College
- Master of Public Accountancy from the University of West Georgia
- Certified Public Accountant licensed by the State of Florida
- Member of the American Institute of Certified Public Accountants (AICPA)
- Member of the Florida Institute of Certified Public Accountants (FICPA)
- Member of the Florida Government Finance Officers Association (FGFOA)

Audit Training

- 2023 M&J Governmental Conference – Participant and Instructor – 16 credit hours
- 2022 M&J Governmental Conference – Participant and Presenter – 14 credit hours
- 2021 M&J Governmental Conference – Instructor and Participant
- 2021 FGFOA School of Governmental Finance – Presenting your Financial Report Card to Non-financial People – Instructor
- 2021 GFOASC – Governmental Financial Report Card – Instructor
- 2021 Georgia Fiscal Management Council Conference – GASB Update – Instructor
- 2021 South Carolina Association of Public Accountants – Evaluating Gov Financial Stmts – Instructor
- 2021 M&J Governmental In-charge Training – Various – Instructor

Other Staff Resources (Technology Services and Fraud Examinations)

We have individuals with extensive experience and certifications relative to Information Systems Technology as well as Fraud Examinations. The following individuals are available to be of service to the Town should the need arise.



Jameson A. Miller, CPA, CISA, CISSP
Partner, Information Technology and Audit Services

Jameson Miller is a partner and has been with Mauldin and Jenkins since graduation from the University of Tennessee at Chattanooga. He currently leads the Firm's Information Systems and Cybersecurity practice. For over 12 years, Jameson has provided audit services to public and private entities throughout the Southeast. Jameson's experience includes audits of general controls, application controls, technical audits and security assessments for information systems.

Jameson has extensive experience with Sarbanes Oxley, SSAE18 System and Organization Controls (SOC) Audits, National Automated Clearinghouse Association (Nacha) Compliance with Appendix Eight of the Nacha Operating Rules and Guidelines, and Gramm-Leach-Bliley Act (GLBA) compliance program implementation, testing and reporting. His technical expertise includes performing vulnerability assessments and penetration testing of information systems using both technical and social engineering techniques. Further, Jameson has:

- Maintained current and relevant information technology and financial accounting continuing professional education credits (CPE);
- Obtained the American Institute of Certified Public Accountants' (AICPA) "Cybersecurity Advisory Services" and "Blockchain for Accounting and Finance" Certificates;
- Presented a 2018 CPE webinar for the Georgia Governmental Financial Officers Association (GGFOA) members entitled, "Cybersecurity Trends and the AICPA's Cybersecurity Risk Management Program;"
- Presented a 2018 CPE breakout session entitled, "What is Blockchain and Why Should I Care?" for the GGFOA's Annual Conference; and
- Presenting an upcoming session for the Georgia Society of CPAs Non-profit conference, "Technologies Transforming Accounting."

Jameson is a member of the AICPA, the Tennessee Society of Certified Public Accountants (TSCPA), and ISACA (formerly the Information Systems Audit and Control Association). In addition, Jameson is an avid outdoor enthusiast and enjoys volunteering as secretary and treasurer of the Board of Directors of the Cumberland Trails Conference, a 501(c)3 non-profit organization. Jameson is a licensed Certified Public Accountant (2010) with the State of Tennessee, a Certified Information Systems Auditor (2018) through ISACA, and a Certified

Information Systems Security Professional (2019) granted by the International Information System Security Certification Consortium. Jameson is currently participating in a 40-hour “Penetration Testing with Kali” continuing education self-study course offered through Offensive Security, the creators of the Kali Linux Penetration Testing operating system. Afterwards, he plans to sit for the Offensive Security Certified Professional (OSCP) 24-hour certification examination.

Considering the fact that Jameson only provides non-traditional consulting-type services to governmental entities, and he does not (and will not) provide audit and accounting services under the guidance of the Yellow Book educational standards, no such continuing education is required or provided under this proposal.



David Roberts
Partner, Governmental Advisory Services

David Roberts is a widely respected leader in providing consulting and advisory services to public-sector organizations at the federal, state, and local level. David has approximately 20 years at KPMG, one of the “Big 4” international accounting firms, and brings an exceptional understanding of governmental clients’ challenges as well as innovative solutions that fit their unique operating and service delivery environment. David now leads our Government Advisory practice, where he will continue to focus on helping governments and individual agencies fulfill and exceed their financial, operational, and regulatory obligations to the public.

David has provided a wide array of advisory services in his career. In the past three years alone, David has performed and supervised approximately 70,000 hours of advisory services which are summarized by type of entity and respective services as follows:

Cities and Counties:

Austin, Texas
Charlotte County, Florida
DeKalb County, Georgia
Fort Lauderdale, Florida
New Orleans, Louisiana
Riverside County, California
Savannah, Georgia

School Districts:

Chicago Public Schools
DeKalb County (GA) Schools

Federal and State Government Entities:

District of Columbia Employment Services Dept.
Assistance
Florida Department of Management Services

Florida Turnpike Enterprise
Georgia Department of Administrative Services
Georgia Department of Community Health
Georgia Department of Economic Development
Assistance
Georgia Department of Labor
Georgia State Road and Tollway Authority

Respective Services Provided:

Zero Based Budgeting Assessment and Strategic Design
Strategic Planning Assistance, and Utilities Dept. Assessments
Water/Sewer Utility Billing Assessment
Water/Sewer Utility Billing Assessment
Zero Based Budgeting Assessment and Strategic Design
Finance Function Assessment
Water/Sewer Utility Billing Assessment

Service Delivery Model Assessment
Human Resources Assessment
Human Resources Recommendation Implementation

Workforce Innovation and Opportunity Act (WIOA) Grant

Quality Assurance/Independent Verification and Validation
Over SAP Implementation
Back-office Project Management Office (PMO)
Human Resources Function Market Scan
Finance Function Review
Workforce Innovation and Opportunity Act (WIOA) Grant

Back-office Assessment and Project Mgmt. Office Support
Agency Merger Assessment
Cost Allocation Assistance
Strategic Planning Assistance

Kentucky Transportation Cabinet
Puerto Rico Dept. of the Treasury
Texas Department of Transportation
Virginia Department of Transportation

Revenue Control Manager
Finance Project Management Office
Back-office SAP Implementation Support
Workforce Strategy Assessment

Special Purpose Entities:

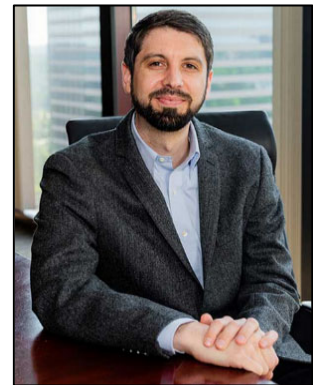
Atlanta Housing Authority
Florida Healthy Kids (NFP)
University of Texas at San Antonio

Human Resources Assessment and Optimization
Vendor Selection Assistance
Payroll Assessment and Optimization

From management consulting and identifying new opportunities, to increasing stakeholder satisfaction and implementing transformational strategies, David and our government advisory team deliver insights and techniques that help government clients leverage public resources efficiently while achieving overarching goals. Our government advisory practice brings to market a team that has direct experience as government employees, change agents, and transformation consultants to help tackle the industry's toughest issues.

Brandon R. Smith, CPA, CCSFP, CHQP
Partner, Advisory Services
Information Technology and Cybersecurity

Brandon Smith joined Mauldin & Jenkins in 2008 after studying Accounting and Information Systems at Georgia Southern University. He works with organizations throughout the Southeast to help deliver a blend of capacity building and advisory services.



His experience includes evaluating cybersecurity, internal control, and risk management policies and practices. He helps organizations review posture and identify prioritized, flexible, repeatable, performance-based, and cost-effective approaches to improve measures and controls.

Expertise includes NIST Cybersecurity Framework, HITRIST Common Security Framework, System and Organization Controls (SOC) Reporting, COSO Internal Control-Integrated Framework, and Uniform Guidance. Services range from reviewing existing policies and practices and providing targeted recommendations in line with proven frameworks, to helping facilitate technical assessments.

Brandon serves on a national Alliance Innovation Committee that represents more than 80 firms nationally, he serves on the AICPA's Stakeholder Advisory Group for its Dynamic Audit Solution currently in development, and he is the chair of M&J's NExT Committee for Innovation. Brandon is enthusiastic about transformative technologies and the impact they have on our clients and our profession, including Data Analytics, Machine Learning, Artificial Intelligence, Robotic Process Automation, and Blockchain. Additional services provided by Brandon and his team include:

- Internal Controls Assessments
- IT/Cybersecurity Framework Assessments
- GLBA Compliance – Information Security
- Vulnerability Assessments
- Internal and External Penetration Testing
- Social Engineering Campaigns
- Cybersecurity Awareness Training

Brandon is a regular speaker for the Georgia Society of CPAs and he serves as a volunteer faculty member for Nonprofit University's certificate programs. He is a member of ISACA, AICPA, GSCPA, Georgia Planned Giving Council, Georgia Center for Nonprofits, Technology Association of Georgia, and HITRUST.



David Jahosky
Partner, Governmental Advisory Services

David Jahosky is a partner and the Governmental Advisory Services Practice Leader for Mauldin & Jenkins. David received both his BA in 1991 and MA in 1993 in Public Administration from the University of Florida. Prior to joining Mauldin & Jenkins, David spent 14 years with KPMG as a leader in its Government Practice and serving as the lead account partner for the State of Florida. Most recently, David spent six years at Anser Advisory Services leading its Strategy, Grants and Compliance practice that served over 75 government clients in nine states, including Florida and Georgia.

As an experienced public sector consultant, David brings extensive national experience in creating and implementing transformational strategies for improving operations, service delivery models, and stakeholder satisfaction. He possesses a deep understanding of business and relationship development, client delivery, and people development.

For more than 30 years, David has been serving public sector entities in meeting the challenges they face in serving the public good – to improve performance, achieve regulatory or standards compliance, and enhance accountability and reporting. David has a strong background in client service delivery and considerable project management experience. David's current and past clients include some of the leading entities in the public sector.

David has substantial experience leading and coordinating advisory engagements across several industries, with a focus on state and local governments, higher education and not-for-profit organizations. David's core skill sets include helping clients solve revenue enhancement, cost optimization, strategy and compliance, operational transformation, and performance management issues. He has helped clients realize their strategic vision, transform operations, improve service delivery, enhance customer service, increase revenue, and reduce costs. David has spoken at numerous industry events and conferences. As part of his responsibilities, David routinely briefed legislative bodies, executive leadership, and policymakers.

Partner and Staff Continuity

We are committed to providing continuity of our engagement team members. We recognize that this is also an important factor for the Town as it limits the amount of retraining that needs to be performed each year. **Our staff retention rates of approximately 87%** are considered to be among the best in the profession (and much better than national firms). We are able to not only provide consistency with the partners and managers on our engagement teams, but seniors and staff as well.

Retention > 87%

This indicates that we retain 87% of our staff for a minimum of five years.

It is also our goal to minimize disruptions to your management personnel by staffing the engagement so as to provide continuity, both during and between audits. It is the Firm's policy not to rotate key audit staff, consultants or specialists off a multi-year contracted audit engagement. Consequently, it is not anticipated that any key audit personnel will be rotated away from this annual audit. In any business, however, turnover is inevitable. When this happens, we will provide resumes of suggested replacements and any changes in key personnel would always be discussed timely with officials to their satisfaction.

Continuing Education of Partners and Staff

All members (i.e., partners) and staff of Mauldin & Jenkins receive substantial continuing education in audit and accounting – typically over 100 hours of such study per year. As soon as a staff person becomes a key ingredient to any type of niche service such as governmental audit, accounting and consulting, specific continuing education is sought. A good example includes sending our staff with over one year of governmental audit experience to various GFOA and AICPA training for audit, accounting and financial reporting courses.

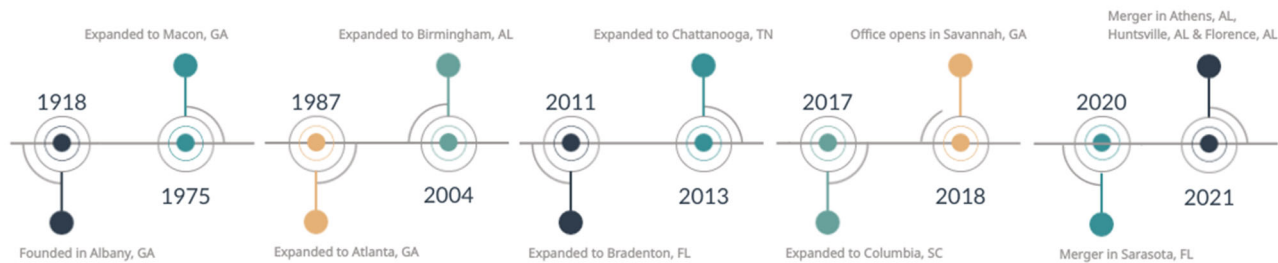
Experience and Qualifications

Firm Qualifications and Experience

Mauldin & Jenkins was formed in 1918 and has been actively engaged in governmental auditing since its inception. We have been operating in Florida since 2011. Mauldin & Jenkins is considered to be one of the Southeast's largest locally owned providers of audit and accounting services and one of the largest certified public accounting firms in the country. Mauldin & Jenkins serves clients throughout the southeastern United States. Mauldin & Jenkins is considered to be a large regional firm.

Mauldin and Jenkins has offices located in Bradenton and Sarasota, Florida; Atlanta, Macon, Sandy Springs, Albany and Savannah, Georgia; Chattanooga, Tennessee; Raleigh, North Carolina; Columbia, South Carolina; Athens, Huntsville, Florence, and Birmingham, Alabama. We have a practice structure with the scale to serve governmental clients well due to the efficient allocation of resources in our geographic area.

Firm History and Expansion



Mauldin & Jenkins provides over 139,000 hours of service to governmental entities on an annual basis. The Firm's governmental practice is the largest niche in the Firm representing approximately 30% of the Firm's total practice. However, size and resources alone are not the most meaningful measure of success; in the end, our clients remain the best judges of Mauldin & Jenkins' value. Other key information relative to the size and experience of Mauldin & Jenkins is as follows:

- **410,000** - approximate total hours of service provided annually to clients of the Firm
- **139,000** - approximate total hours of service provided annually to governmental clients
- **54%** - percentage of governmental practice as compared to Firm's attestation practice
- **30%** - percentage of governmental practice as compared to Firm's overall practice
- **700** - approximate total governmental entities served in past three years
- **535** - total number of Firm personnel
- **154** - total clients served who obtain the GFOA/ASBO Certificates
- **47** - total clients with publicly issued debts in excess of \$75 million
- **71** - total number of Firm partners
- **25** - total number of full-time governmental partners and directors
- **16** - total number of full-time governmental managers
- **150** - total number of professionals with current governmental experience
- **292** - number of federal Single Audits performed by the Firm in 2022 covering over \$7 billion in federal expenditures (more than any other firm in our geographic service area)

A Century of Service

Mauldin & Jenkins' commitment to government began when our Firm was established in 1918. Since then, we have viewed service to governments as significant to the overall success of the Firm. Today, the governmental sector is an industry that has been specifically identified for our continued growth in professional services. Accordingly, all professionals, from entry-level accountants to partners (who select the governmental sector as their focus), are trained to understand the issues and meet the needs of state and local governmental entities.

As noted previously, Mauldin & Jenkins employs **40 partners, directors and managers** who dedicate **100%** of their time serving governmental clients. We also have numerous additional professionals with current experience in providing services to governmental entities – many of whom spend their time exclusively on governmental clients. Mauldin & Jenkins' dedicated professionals can bring a comprehensive understanding of the issues that face government entities as well as "bench strength" at all levels, allowing us to respond swiftly and effectively to your evolving needs.

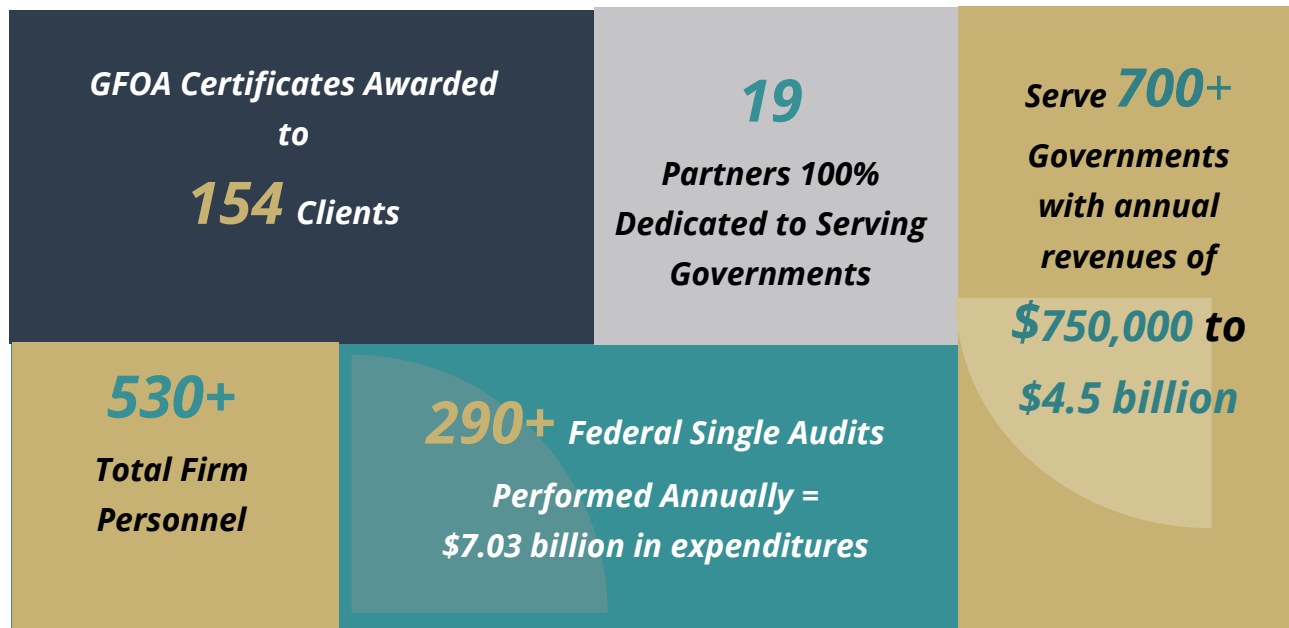


The goal of our governmental practice is to help governments improve their financial processes and strategies so that they can in turn, achieve their goal of improving the lives of their citizens. This shared commitment to the goals of our clients has resulted in a significant government clientele. As noted in our Letter of Transmittal, we currently **serve over 700 governments in the Southeast.**

Location of the Office from which the Work is to be Performed

The Bradenton office will be the office providing services to the Town and employs **20 professionals with current experience in providing services to governmental entities** and who will meet the continuing professional education requirements set forth in the U.S. General Accounting Office *Government Auditing Standards*. In addition to specializing in assurance and consulting services for local governments, the Bradenton office also provides assurance and consulting services for nonprofit and financial institution organizations, as well as tax and advisory services for individuals and business. A further profile of the Bradenton office and the Firm's **professional** staff as a whole is as follows:

Professional Staff by Level	Bradenton	Firm-Wide
Partners	8	71
Directors/Managers	13	120
Senior Associates	11	104
Associates	15	189
Total	47	484



Range of Activities

Other Industries and Services by Mauldin & Jenkins:

Each of Mauldin & Jenkins' offices provides a wide variety of services to a broad range of clientele. We have partners and managers who are responsible for specialized practice areas of auditing and accounting, taxes and management advisory services. Their purpose, as leaders in the particular practice area, is to establish policies with respect to technical matters in these specific areas and ensure that the quality of the Firm's practice is maintained.

Industries Served: Over the years, our partners have developed expertise in certain industries representative of a cross section of the Florida economy, including:

- Governmental Entities
- SEC Registrants
- Wholesale Distribution
- Agri-Businesses
- Manufacturing
- Professional Services
- Employee Benefit Plans
- Financial Institutions
- Non-Profit Organizations
- Retail Businesses
- Long-Term Healthcare
- Construction and Development
- Individuals, Estates and Trusts
- Real Estate Management

Services Provided: This diversity of practice enables our personnel to experience a wide variety of business, accounting and tax situations. We provide the traditional and non-traditional services such as:

- Financial Audit/Review/Compilation
- Compliance Audits and Single Audits
- Agreed-Upon Procedures
- Forensic Audits
- Bond Issuance Services
- Performance Audits
- State Sales Tax Matters
- International Tax Matters
- Business and Strategic Planning
- Profitability Consulting
- Budgeting
- Buy-Sell Agreements and Business Valuation Issues
- Income Tax Planning and Preparation
- Multi-State Income Tax Issues
- Information Systems Consulting
- Cost Accounting Analysis
- Healthcare Cost Reimbursement
- Outsourced Billing Services
- Fixed Asset Inventories
- Succession and Exit Strategy Consulting
- Estate Planning
- Management Information Systems
- Employee Benefit Plan Administration
- Merger/Acquisition and Expansion Financing

Governments Served in the Past Five Years

Perhaps the greatest indicator of our reliability as a professional service provider to state and local governments is our list of governmental clients.

The governmental client listings on the following page are provided to demonstrate Mauldin & Jenkins' vast experience serving the governmental sector, and these listings are broken down by type of governmental unit, and the respective listings represents clients we have served in the past five years (and not over a lifetime).

Cities. Cities we have served within the past five years are as follows. Please also note that over the past three years we have also provided separate audits for numerous CRA entities as required by the State of Florida.

Georgia

- 1) Albany
- 2) Alpharetta
- 3) Americus
- 4) Ashburn
- 5) Atlanta
- 6) Austell
- 7) Bainbridge
- 8) Baldwin
- 9) Ball Ground
- 10) Barnesville
- 11) Bloomingdale
- 12) Brookhaven
- 13) Brunswick
- 14) Byron
- 15) Cartersville
- 16) Cedartown
- 17) Centerville
- 18) Chamblee
- 19) Chattahoochee Hills
- 20) Clarkston
- 21) College Park
- 22) Conyers
- 23) Cordele
- 24) Covington
- 25) Dalton
- 26) Decatur
- 27) Doraville
- 28) Douglasville
- 29) Duluth
- 30) Dunwoody
- 31) Fairburn
- 32) Fayetteville
- 33) Flovilla
- 34) Forest Park
- 35) Forsyth
- 36) Garden City
- 37) Grovetown
- 38) Griffin
- 39) Hapeville
- 40) Hinesville
- 41) Holly Springs
- 42) Jefferson

- 43) Jeffersonville
- 44) Johns Creek
- 45) Kennesaw
- 46) Kingsland
- 47) LaGrange
- 48) Lawrenceville
- 49) Leesburg
- 50) Lilburn
- 51) Lone Oak
- 52) Lyons
- 53) Milledgeville
- 54) Milner
- 55) Milton
- 56) Monroe
- 57) Morrow
- 58) Nashville
- 59) Oxford
- 60) Peachtree City
- 61) Peachtree Corners
- 62) Pearson
- 63) Perry
- 64) Pooler
- 65) Powder Springs
- 66) Port Wentworth
- 67) Richmond Hill
- 68) Riverdale
- 69) Rockmart
- 70) Rome
- 71) Roswell
- 72) Sandy Springs
- 73) Savannah
- 74) Sharpsburg
- 75) Social Circle
- 76) South Fulton
- 77) St. Marys
- 78) Stockbridge
- 79) Stonecrest
- 80) Suwanee
- 81) Temple
- 82) Thomasville
- 83) Thunderbolt
- 84) Tifton
- 85) Toccoa

- 86) Tucker
- 87) Turin
- 88) Tybee Island
- 89) Union City
- 90) Valdosta
- 91) Villa Rica
- 92) Waycross
- 93) West Point

Alabama/Mississippi

- 94) Athens, AL
- 95) Huntsville, AL
- 96) Tuscaloosa, AL
- 97) Gulfport, MS
- 98) Meridian, MS

Florida

- 99) Apopka
- 100) Callaway
- 101) Clewiston
- 102) Crystal River
- 103) Destin
- 104) Fernandina Beach
- 105) Ft. Myers Beach
- 106) Haines City
- 107) Hallandale Beach
- 108) Indiantown
- 109) Islamorada
- 110) Jupiter Inlet Colony
- 111) LaBelle
- 112) Lake Placid
- 113) Longboat Key
- 114) Marco Island
- 115) Naples
- 116) New Port Richey
- 117) North Port
- 118) Pinecrest
- 119) Plant City
- 120) Tarpon Springs
- 121) Tequesta
- 122) Wildwood

North Carolina

- 123) Asheville
- 124) Black Mountain
- 125) Garner
- 126) Hendersonville
- 127) Jacksonville
- 128) Rocky Mount
- 129) Selma
- 130) Zebulon

South Carolina

- 131) Aiken
- 132) Beaufort
- 133) Cayce
- 134) Chapin
- 135) Charleston
- 136) Clemson
- 137) Clover
- 138) Hanahan
- 139) Hardeeville
- 140) Hemingway
- 141) Hilton Head Island
- 142) Hollywood
- 143) Georgetown
- 144) Goose Creek
- 145) Johnsonville
- 146) Kiawah Island
- 147) Mount Pleasant
- 148) North Augusta
- 149) North Charleston
- 150) Orangeburg
- 151) Pamplico
- 152) Rock Hill
- 153) Seabrook Island
- 154) Summerville

Tennessee

- 155) Bristol
- 156) Clarksville
- 157) Jamestown
- 158) Jackson
- 159) Spring Hill

Certificates of Achievement and Excellence in Financial Reporting



Mauldin & Jenkins has served **over 700 governments** in the past several years, and **154** governmental units who obtain the GFOA's Certificate of Achievement for Excellence in Financial Reporting (and, or the ASBO's Certificate of Excellence in Financial Reporting). We ***have never failed to obtain the Certificate!*** Every Annual Comprehensive Financial Report submitted has received the award.

The following are our current clients:

Counties:

- 1) Athens-Clarke
- 2) Augusta-Richmond
- 3) Barrow
- 4) Beaufort, SC
- 5) Cartersville
- 6) Chatham
- 7) Clayton
- 8) Colleton, SC
- 9) Columbus-Muscogee
- 10) DeKalb
- 11) Douglas
- 12) Edgefield, SC
- 13) Floyd
- 14) Forsyth
- 15) Glynn
- 16) Greenville, SC
- 17) Gwinnett
- 18) Halifax, NC
- 19) Hamilton, TN
- 20) Henry
- 21) Jackson
- 22) Lancaster, SC
- 23) Liberty
- 24) Macon-Bibb
- 25) Morgan
- 26) Newton
- 27) Oconee, SC
- 28) Orange, NC
- 29) Paulding
- 30) Richland, SC

- 31) Rockdale
- 32) Spalding
- 33) Walton
- 34) Whitfield

Cities:

- 35) Aiken, SC
- 36) Albany
- 37) Alpharetta
- 38) Americus
- 39) Apopka, FL
- 40) Austell
- 41) Ball Ground
- 42) Beaufort, SC
- 43) Black Mountain, NC
- 44) Bluffton, SC
- 45) Bradenton, FL
- 46) Bristol, TN
- 47) Brookhaven
- 48) Brunswick
- 49) Callaway, FL
- 50) Cartersville
- 51) Cayce, SC
- 52) Chamblee
- 53) Charleston, SC
- 54) Chamblee
- 55) Chapin, SC
- 56) Clarksville, TN
- 57) Clemson, SC
- 58) College Park
- 59) Conyers
- 60) Cooper City, FL

- 61) Covington
- 62) Decatur
- 63) Douglasville
- 64) Dunwoody
- 65) Fayetteville
- 66) Fairburn
- 67) Forest Park
- 68) Garden City
- 69) Griffin
- 70) Gulfport, MS
- 71) Haines City, FL
- 72) Hallandale Bch, FL
- 73) Hapeville
- 74) Hardeeville, SC
- 75) Hendersonville, NC
- 76) Hinesville
- 77) Holly Springs
- 78) John's Creek
- 79) Kennesaw
- 80) Kiawah Island
- 81) Kingsland
- 82) Marco Island, FL
- 83) Lagrange
- 84) Lawrenceville
- 85) Longboat Key, FL
- 86) Milledgeville
- 87) Milton
- 88) Monroe
- 89) Morrow
- 90) Mount Pleasant, SC
- 91) Naples, FL

- 92) N. Augusta, SC
- 93) N. Charleston, SC
- 94) North Port, FL
- 95) Peachtree City
- 96) Pensacola, FL
- 97) Perry
- 98) Pinecrest, FL
- 99) Plant City, FL
- 100) Pooler
- 101) Port Wentworth
- 102) Powder Springs
- 103) Richmond Hill
- 104) Riverdale
- 105) Rockmart
- 106) Rome
- 107) Roswell
- 108) St. Marys
- 109) Sandy Springs
- 110) Savannah
- 111) Social Circle
- 112) Stockbridge
- 113) Suwanee
- 114) Thunderbolt
- 115) Tarpon Springs, FL
- 116) Thomasville
- 117) Tuscaloosa, AL
- 118) Union City
- 119) Valdosta
- 120) Villa Rica

Boards of Education:

- 121) Atlanta Public Schools
- 122) Beaufort County Schools
- 123) Bibb County Schools
- 124) Cartersville City Schools
- 125) Cobb County Schools
- 126) Fayette County Schools
- 127) Fulton County Schools
- 128) Gwinnett County Schools
- 129) Horry County Schools
- 130) Lee County School District
- 131) Marietta City Schools
- 132) Richland Co. School District One
- 133) Savannah-Chatham County Schools

State Governmental Entities:

- 134) Ga. Environ. Fin. Auth. (GEFA)
- 135) Ga. Ports Authority

Other Governmental Entities:

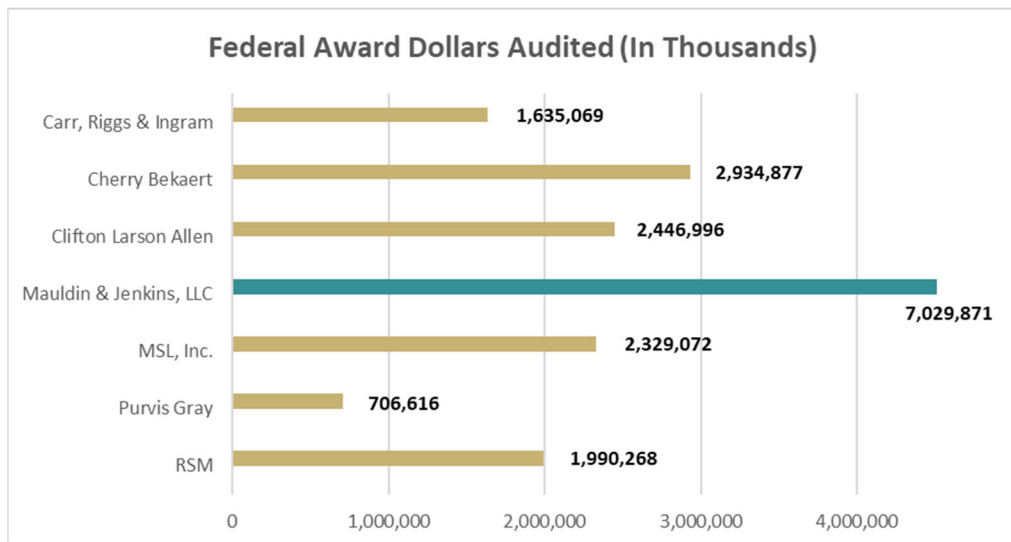
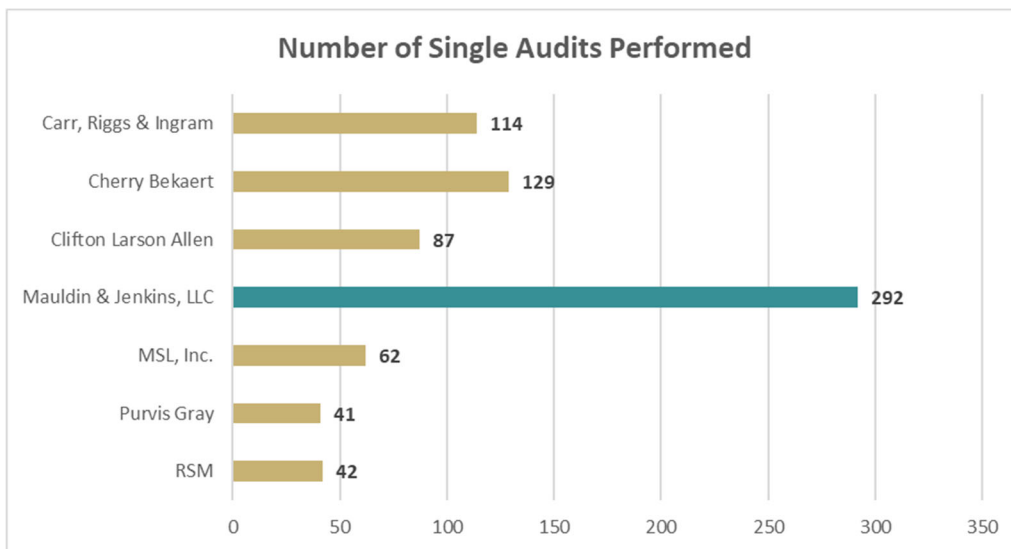
- 136) Beaufort Jasper Water & Sewer Authority

- 137) Cape Fear Public Utility Authority
- 138) Central Savannah River Area Regional Comm.
- 139) Charleston Water System
- 140) Clayton County Water Authority
- 141) Cobb County - Marietta Water Authority
- 142) Emerald Coast Utilities Authority
- 143) Greenville Water System
- 144) Greenwood Commissioners of Public Works
- 145) Greer Commission of Public Works
- 146) Henry County Water Authority
- 147) Lowcountry Regional Transportation Authority
- 148) Macon Water Authority
- 149) Mount Pleasant Waterworks
- 150) North Charleston Sewer District
- 151) Port of Corpus Christi Authority
- 152) Public Building Authority of Knox Co. & Knoxville
- 153) South Florida Transportation Authority
- 154) Tampa Bay Water Authority

Single Audit Experience

With the distribution of Coronavirus State and Local Fiscal Recover Funds during 2021 and 2022, many entities will require Single Audits over the expenditures of these funds. Mauldin & Jenkins is a leader in providing audit and Single Audit services to governmental and not-for-profit entities in the Southeast similar to the Town. We also have substantial experience performing Florida State Single Audits as required by the Florida Auditor General's office. Based on the most recent data provided by the Federal Audit Clearinghouse (FAC) which is for calendar year 2022, Mauldin & Jenkins audited **292 entities** representing approximately **\$7.03 billion in federal expenditures** for state, local government, and non-profit clients which is the:

- **Highest** among public accounting firms in the Southeast as it relates to the number of Single Audits conducted; and
- **Highest** among public accounting firms in the Southeast as it relates to total expenditures audited under the Single Audit Act.



NOTE: The above information was summarized from the Federal Audit Clearinghouse for audits with fiscal year-ends in calendar year 2022 (the last year for which complete information is available) for states in which our Firm has offices.

No Litigation, Federal/State Desk Reviews or Disciplinary Action

Mauldin & Jenkins has had no cases brought forth against the Firm over the past five years in which our Firm was a named party. Additionally, Mauldin & Jenkins has not had a federal or state desk review or field review of its audits during the past five years. Mauldin & Jenkins has not had any disciplinary actions taken (nor are any pending) against the Firm during the past five years with any state or federal regulatory bodies or professional organizations. We have a long-standing history of providing excellent services to our clients and have had no prior record of substandard audit work.

As noted above, there is no pending litigation against our Firm that may be of relevance to the fulfillment of a contract between Mauldin & Jenkins and the Town. Additionally, we note no problems that may affect our ability to complete the project as defined in the Town's request for proposal.

Governmental Attestation Services

Other attestation services beyond financial and compliance audits which Mauldin & Jenkins currently provides to our clients include:

- Forensic audits
- Performance audits
- Information systems audits
- Cybersecurity assessments
- Agreed-upon procedures
- Bond issuance services
- Capital asset inventory services

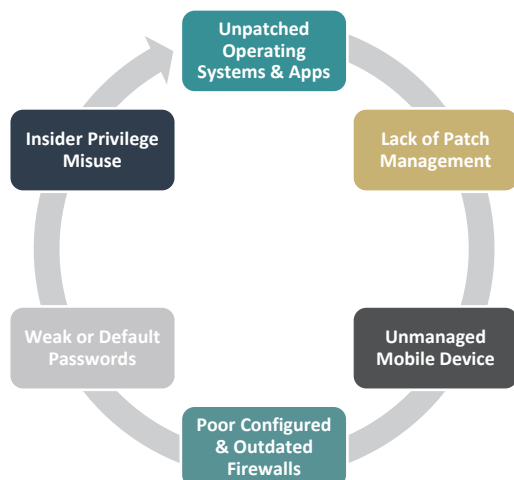
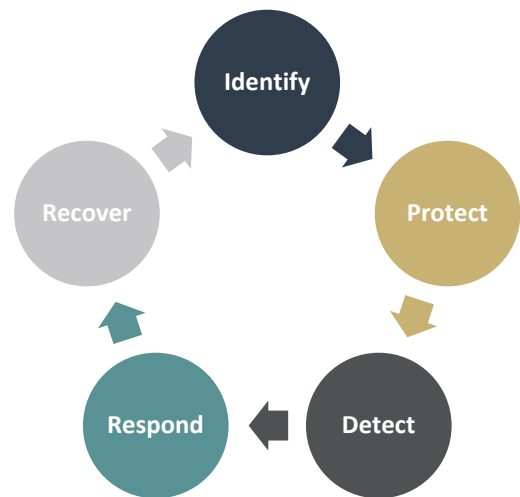
Governmental IT Solutions

As noted above, Mauldin & Jenkins performs various IT attestation and non-attestation services. The following are three such services:

Cybersecurity Framework Engagements

With governments dealing with IT ransoms, cybersecurity is one of the top issues on the minds of nearly every government (large and small). Managing this business issue is especially challenging. A government with a highly mature cybersecurity risk management program still has a residual risk that a material cybersecurity breach could occur and not be detected in a timely manner.

Services can be provided via: (1) attestation engagements, or (2) consulting engagements. The AICPA has established standards for performing attestation engagements in this arena with the issuance of the SOC for Cybersecurity as part of its suite of System and Organization Controls (SOC) reporting. Consulting services can be provided while not compromising auditor independence.

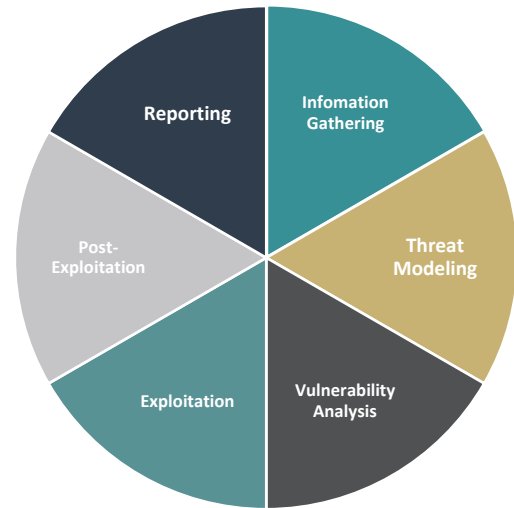


System Vulnerability Assessments Engagements

This is the process of defining, identifying, classifying and prioritizing vulnerabilities in computer systems, applications and networks infrastructures, and providing an assessment with necessary knowledge, awareness and risks to understand the threats to determine appropriate reactions. Using specialized tools and applications, we can access networks to scan with automated tools and interrogate every device connected to network with the objective of searching for misconfigurations, unsupported software, missing software updates and patches, etc.

Penetration Testing Engagements

This is the practice of testing a computer system to find security vulnerabilities that a hacker/attacker could exploit using automation or manual applications. The process involves gathering information about the target before the test, identifying possible entry points, attempting to break in – actually or virtually – and reporting back the findings. Tests come from external or internal angles of entry. Our main objective is to identify security weaknesses. Penetration testing can also be used to: test an organization's security policy; its adherence to compliance requirements; its employees' security awareness; and, the government's ability to identify and respond to security incidents.

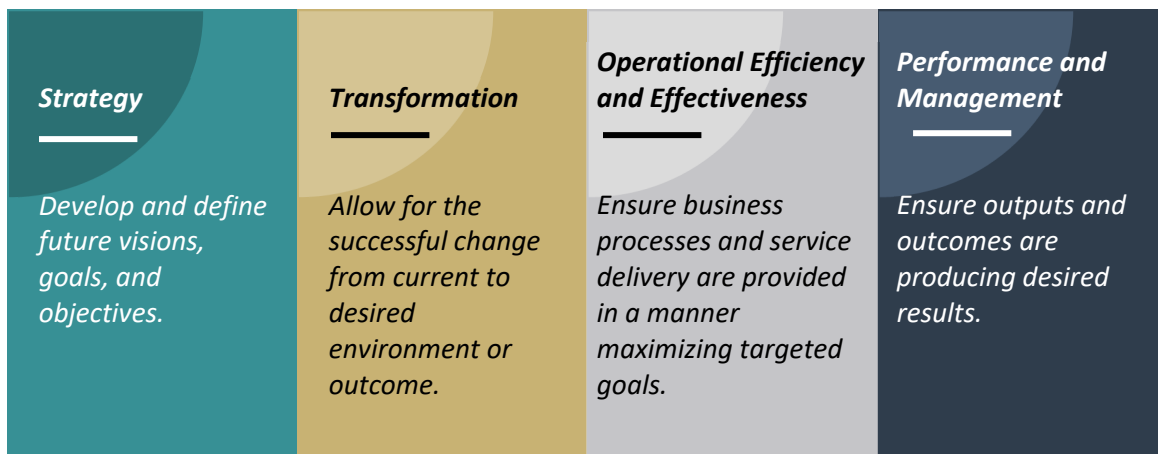


We would like to express our sincere appreciation for the quality of service provided by the staff of Mauldin & Jenkins. We would like to thank you for the level of detail and accountability you have demonstrated on this project and the way you conduct business as a whole. Our team could not be more satisfied with your work and we look forward to continuing this relationship

Angela Jackson, City of Fairburn, Finance Director

Governmental Advisory Services

Beyond traditional audit and accounting services and IT services, we provide advisory services that are wide-ranging in nature. Our experienced government advisory team helps governments, governmental agencies and special purpose governmental organizations balance fiscal responsibility with the latest business strategies to achieve targeted and overarching objectives. Our advisory services can be summarized via the following chart:



Similar Engagements

The following is a list of governmental audits performed in the past five years by the Bradenton office included within this proposal as references. Feel free to give any of these clients, or any others listed within this proposal, a call. The information below is intended to demonstrate that we understand the nature of the operations similar in size to the Town and have relevant, current experience serving Florida governments in your area. Mauldin & Jenkins has substantial expertise gained from auditing other governments in the Southeast which also have significant governmental operations and other large utility enterprise operations. This concept touches on one of the more unique qualities Mauldin & Jenkins brings to you, a Firm with vast resources of experienced people normally associated with larger national firms, but sensitivity to client service similar to that provided by many smaller firms. **We believe the Town and Mauldin & Jenkins to be a good match.**

1) Village of Tequesta, Florida

General Information	Municipal government with a population of approximately 6,000. The Village has assets and deferred outflows of resources of approximately \$57 million and annual revenues of approximately \$25 million. The Village provides numerous services including: water, solid waste, stormwater, public safety, transportation, Leisure services, and other customary services.
Scope and Type of Engagement	Financial audits and compliance audits in accordance with Uniform Guidance (Single Audits) and Florida Single Audit Act. Preparation of the Annual Comprehensive Financial Report and Certificate of Achievement awarded by GFOA. Audit of three single employer DB pension plans.
Dates	September 30, 2021 through present
Partners	Daniel Anderson, Wade Sansbury
Total Hours	250 hours
Contact Information	Mr. Jeffery Snyder, Finance Director – (561) 768-0424 – Fax (561) 768-0699 jsnyder@tequesta.org 345 Tequesta Drive, Tequesta, FL 33469-0273

2) Town of Jupiter Inlet Colony, Florida

General Information	Municipal government with a population of approximately 400. The Town has assets of approximately \$14 million and annual revenues of approximately \$3.5 million. The Town provides numerous services including: general government, public safety, public works, roads and walkways, and building, and other customary services.
Scope and Type of Engagement	Financial audits and compliance audits in accordance with Florida Statutes. Preparation of the Annual Financial Report.
Dates	September 30, 2021 through present
Partner	Daniel Anderson
Total Hours	200 hours
Contact Information	Mr. Kevin Lucas, Town Administrator – (561) 746-3787 lucask@jupiterinletcolony.org 50 Colony Road, Jupiter Inlet, FL 33469

3) City of North Port, Florida

General Information	City government with a population of approximately 60,000. The City has assets of approximately \$507 million and annual revenues of approximately \$95 million. The City provides numerous services including: water and sewer, solid waste, and other customary services. The City uses Central Square/Superion module GMBA for its accounting needs.
Scope and Type of Engagement	Financial audits and compliance audits in accordance with OMB Circular A-133. Preparation of the Annual Comprehensive Financial Report and Certificate of Achievement awarded by GFOA.
Dates	September 30, 2013 through present
Partner	Wade Sansbury
Total Hours	450 hours
Contact Information	Mr. Scott Skipper, Accounting Manager – (941) 429-7108 – Fax (941) 429-7209 sskipper@cityofnorthport.com 4970 City Hall Blvd., North Port, FL 34289

4) City of Wildwood, Florida

General Information	City government with a population of approximately 16,500. The City has assets of approximately \$100 million and annual revenues of approximately \$32 million. The City provides numerous services including: water and sewer, sanitation, stormwater, CRA, public safety, parks and recreation, community development, and other customary services.
Scope and Type of Engagement	Financial audits and compliance audits in accordance with the Uniform Guidance and the Florida State Single Audit requirements. Preparation of the Annual Financial Report.
Dates	September 30, 2013 through present
Partner	Daniel Anderson
Total Hours	350 hours
Contact Information	Ms. Cassandra Smith, Assistant City Manager/CFO – (352) 661-6106 csmith@wildwood-fl.gov 100 N Main St, Wildwood, FL 34785

5) Town of Longboat Key, Florida

General Information	Municipal government with a population of approximately 7,600. The Town has assets and deferred outflows of resources of approximately \$241 million and annual revenues of approximately \$62 million. The Town provides numerous services including: water and sewer, public safety, transportation, Leisure services, and other customary services.
Scope and Type of Engagement	Financial audits and compliance audits in accordance with Uniform Guidance (Single Audits) and Florida Single Audit Act. Preparation of the Annual Comprehensive Financial Report and Certificate of Achievement awarded by GFOA. Audit of three single employer DB pension plans.
Dates	September 30, 2014 through present
Partner	Wade Sansbury
Total Hours	350 hours
Contact Information	Ms. Sue Smith, Finance Director – (941) 316-6882 – Fax (941) 316-1656 ssmith@longboatkey.org 501 Bay Isles Road, Longboat Key, FL 34228

The following is a list of municipal governmental audits performed in the past three years by the Bradenton office along with contact names and phone numbers for the Town to utilize in evaluating our experience, abilities, and past performances serving similar Florida entities:

Client Name	Dates of Annual Audit Services	Contact Person	Phone Number	Hours	Partner
1 City of Apopka	2020 to current	Blanche Sherman, Finance Director	407-703-1709	450	Anderson
2 City of Atlantis	Beginning 2023	Brian Moree, City Manager	561-965-1744	250	Anderson
3 City of Callaway	2018 to current	David Schultz, Finance Director	850-871-6000	300	Sansbury
4 City of Clewiston	2019 to current	Shari Howell, Finance Director	863-983-1484	300	Sansbury
5 City of Crystal River	2014 to current	Michelle Russell, Finance Director	352-795-4216	300	Sansbury
6 City of Fernandina Beach	2021 to current	Pauline Testagrose, Comptroller	904-310-3334	500	Sansbury
7 City of Haines City	2012 to current	Omar DeJesus, Finance Director	863-421-9902	400	Sansbury
8 City of Hallandale Beach	2017 to 2022	Geovanne Neste, Finance Director	954-457-1365	550	Sansbury
9 City of LaBelle	2021 to current	Gracie Morton, Finance Director	863-675-2872	200	Anderson
10 City of Marco Island	2013 to current	Gil Polanco, Finance Director	239-389-5016	350	Anderson
11 City of Naples	2006 to current	Gary Young, Finance Director	239-213-1815	550	Sansbury
12 City of New Port Richey	2021 to current	Crystal Dunn, Finance Director	727-853-1054	450	Sansbury
13 City of North Port	2013 to current	Scott Skipper, Accounting Director	941-429-7108	450	Sansbury
14 City of Palmetto	2021 to current	Cheryl Miller, Finance Director	941-723-4570	450	Sansbury
15 City of Plant City	2013 to current	Diane Reichard, Finance Director	813-659-4215	450	Sansbury
16 City of Tarpon Springs	2020 to current	Ron Haring, Finance Director	727-943-1150	400	Anderson
17 City of Wildwood	2018 to current	Cassandra Smith, City Clerk/Finance Director	352-330-1330	300	Anderson
18 City of Winter Haven	Beginning 2023	CJ Scott, Chief Financial Officer	863-291-5689	700	Anderson
19 Town of Fort Myers Beach	2019 to current	Joe Onzick, Finance Director	239-765-0202	350	Sansbury
20 Town of Gulf Stream	2022 to current	Renee Basel, Town Clerk	561-276-5116	200	Anderson
21 Town of Jupiter Inlet Colony	2021 to current	Kevin Lucas, Town Administrator	561-746-3787	200	Anderson
22 Town of Juno Beach	Beginning 2023	Michael Ventura, Finance Director	561-656-0320	200	Anderson
23 Town of Jupiter Island	Beginning 2023	Matthew Pazanski, Finance/HR Director	772-545-0103	400	Anderson
24 Town of Lake Placid	2012 to current	Rachel Osborne, Finance Director	863-699-3747	250	Anderson
25 Town of Longboat Key	2014 to current	Susan Smith, Finance Director	941-316-6882	400	Sansbury
26 Village of Islamorada	2013 to 2022	Maria Bassett, Finance Director	305-664-6445	450	Anderson
27 Village of Tequesta	2021 to current	Jeff Snyder, Finance Director	561-768-0424	300	Sansbury

Schedule of Fees

We appreciate the opportunity to propose on providing audit services to the Town, and we are pleased to submit a qualifications package including cost estimates to provide annual financial and compliance auditing services. As requested, we have listed an all-inclusive maximum fee for the audit engagement for the fiscal years 2023 through 2027. This cost proposal contains all pricing information relative to the performance of the audits.

September 30, 2023	\$32,500
September 30, 2024	\$33,500
September 30, 2025	\$34,500
September 30, 2026	\$35,500
September 30, 2027	\$36,500

Important Notes to be Considered Regarding our Fee Proposal:

Note (1) – Unlimited Correspondence: It is Mauldin & Jenkins’ policy to not charge for routine conversations that occur between the Town and Mauldin & Jenkins. We encourage communication throughout the year. If significant research is involved, we will discuss with you any potential fees prior to beginning.

Note (2) – Free Periodic Continuing Education: As noted in our proposal, we provide free continuing education classes to our clients. This could amount to approximately \$2,000 of annual savings for the Town’s estimated finance department per person.

Note (3) – Additional Services: If it should become necessary for the Town to request Mauldin & Jenkins to provide any additional services (such as bond assurances, etc.), then such additional work shall be performed only if set forth in an addendum to the contract between the Town and Mauldin & Jenkins. The rates noted above will be utilized to any additional work required over the three-year period.

Note (4) – No Hidden Fees or Costs: The pricing schedules contain all pricing information relative to performance of the audit as required by the Town including all reimbursement for travel, lodging, communications, etc. Our estimated number of hours and the associated fee estimate indicated are based on our professional judgment and experience with similar governmental entities. So long as there are no significant changes in the operations of the Town and or the scope of services requested or significant problems requiring additional time, our quoted fees will not change.

Note (5) – Single Audit Costs: Because the Town does not always meet the Single Audit requirement, we have elected to price this service separately. This way the Town will only pay for this service if and when needed. We propose a cost of \$5,000 per major program over the term of the Town contract.

Additional Data

Florida Licenses

Ron DeSantis, Governor	Melanie S. Griffin, Secretary
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STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF ACCOUNTANCY

LICENSE NUMBER: AD0007585	EXPIRATION DATE: DECEMBER 31, 2025
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THE ACCOUNTANCY CORPORATION HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 473, FLORIDA STATUTES

MAULDIN & JENKINS, CERTIFIED PUBLIC ACCOUNTANTS, LLC
 MAULDIN & JENKINS
 200 GALLERIA PKWY SE SUITE 1700
 ATLANTA GA 30339



ISSUED: 11/16/2023

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Ron DeSantis, Governor	Melanie S. Griffin, Secretary
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STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF ACCOUNTANCY

LICENSE NUMBER: AC42735	EXPIRATION DATE: DECEMBER 31, 2025
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THE CERTIFIED PUBLIC ACCOUNTANT HEREIN IS LICENSED UNDER THE PROVISIONS OF CHAPTER 473, FLORIDA STATUTES

ANDERSON, DANIEL ROSS
 1401 MANATEE AVE W
 SUITE 1200
 BRADENTON FL 34205



ISSUED: 12/27/2023

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Ron DeSantis, Governor

Melanie S. Griffin, Secretary

STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF ACCOUNTANCY

LICENSE NUMBER: AC45811

EXPIRATION DATE: DECEMBER 31, 2025

THE CERTIFIED PUBLIC ACCOUNTANT HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 473, FLORIDA STATUTES

SANSBURY, WADE PATTEN
1401 MANATEE AVENUE WEST
SUITE 1200
BRADENTON FL 34205



ISSUED: 09/18/2023

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Ron DeSantis, Governor

Melanie S. Griffin, Secretary



STATE OF FLORIDA
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION
BOARD OF ACCOUNTANCY

THE CERTIFIED PUBLIC ACCOUNTANT HEREIN IS LICENSED UNDER THE
PROVISIONS OF CHAPTER 473, FLORIDA STATUTES

MARLOWE, GARRETT GRANT

5718 19TH AVE N
ST PETERSBURG FL 33710

LICENSE NUMBER: AC55019

EXPIRATION DATE: DECEMBER 31, 2024

Always verify licenses online at MyFloridaLicense.com



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Certificates of Insurance



CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
01/31/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Edgewood Partners Insurance Center Lemme, a division of EPIC 111 West Campbell 4th Floor Arlington Heights, IL 60005 INSURED Mauldin & Jenkins, LLC 200 Galleria Parkway Suite 1700 Atlanta, GA 30339-5918	1-847-385-6800 CONTACT NAME: Nadine Friedman Daniels PHONE (A/C, No, Ext): 847-385-6800 FAX (A/C, No): E-MAIL ADDRESS: PSGCerts@lemme.com INSURER(S) AFFORDING COVERAGE INSURER A: MSIG Specialty Insurance USA and various INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:
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COVERAGES

CERTIFICATE NUMBER: 70505723

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$ \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS NON-OWNED AUTOS ONLY					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$ \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/> N/A				PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability		MSTAPL-00010	01/23/24	01/23/25	Each Claim 1,000,000 Aggregate 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

Parties at Interest

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

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ACORD 25 (2016/03)
 Theresa.Readdy@lemme.com_LEM
 70505723

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

07/11/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER PointeNorth Insurance Group, LLC PO Box 724728 Atlanta GA 31139		CONTACT NAME: Lisa Lewis PHONE (A/C, No, Ext): (770) 858-7540 FAX (A/C, No): (770) 858-7545 E-MAIL ADDRESS: lisa.lewis@pninsurance.com	
INSURED Mauldin&Jenkins, LLC 200 Galleria Pkwy SE Ste 1700 Atlanta GA 30339-5946		INSURER(S) AFFORDING COVERAGE INSURER A: AllAmerica Financial Benefits INSURER B: Great Point Insurance INSURER C: Hanover Insurance Company INSURER D: INSURER E: INSURER F:	
		NAIC # 41840 524210	

COVERAGES

CERTIFICATE NUMBER: 2023-24

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PROJECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:	Y	Y	Z2AJ466092	07/01/2023	07/01/2024	EACH OCCURRENCE \$ 2,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 2,000,000 MED EXP (Any one person) \$ 10,000 PERSONAL & ADV INJURY \$ 2,000,000 GENERAL AGGREGATE \$ 4,000,000 PRODUCTS - COMP/OP AGG \$ Employee Benefits \$ 2,000,000
A	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input checked="" type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input checked="" type="checkbox"/> NON-OWNED AUTOS ONLY			Z2AJ466092	07/01/2023	07/01/2024	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
B	<input checked="" type="checkbox"/> UMBRELLA LIAB <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 0			GP03-22-2412545	07/01/2023	07/01/2024	EACH OCCURRENCE \$ 10,000,000 AGGREGATE \$ 10,000,000 \$
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A	W2A-J448906-00	07/01/2023	07/01/2024	PER STATUTE OTH-ER E.L. EACH ACCIDENT \$ 1,000,000 E.L. DISEASE - EA EMPLOYEE \$ 1,000,000 E.L. DISEASE - POLICY LIMIT \$ 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

CANCELLATION

FOR INFORMATION ONLY	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
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ACORD 25 (2016/03)

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CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)
10/12/2023

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must have ADDITIONAL INSURED provisions or be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER Edgewood Partners Insurance Center Lemme, a division of EPIC 111 West Campbell 4th Floor Arlington Heights, IL 60005	1-847-385-6800 CONTACT NAME: Nadine Daniels PHONE (A/C, No, Ext): 847-385-6800 FAX (A/C, No): E-MAIL ADDRESS: PSGcerts@lemme.com
INSURED Mauldin & Jenkins, LLC 200 Galleria Parkway Suite 1700 Atlanta, GA 30339-5918	INSURER(S) AFFORDING COVERAGE INSURER A: BERKLEY ASSUR CO INSURER B: INSURER C: INSURER D: INSURER E: INSURER F:

COVERAGES

CERTIFICATE NUMBER: 69884590

REVISION NUMBER:

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS.

INSR LTR	TYPE OF INSURANCE	ADDL SUBR INSD WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
	COMMERCIAL GENERAL LIABILITY <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:					EACH OCCURRENCE \$ DAMAGE TO RENTED PREMISES (Ea occurrence) \$ MED EXP (Any one person) \$ PERSONAL & ADV INJURY \$ GENERAL AGGREGATE \$ PRODUCTS - COMP/OP AGG \$
	AUTOMOBILE LIABILITY <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY					COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$
	UMBRELLA LIAB <input type="checkbox"/> OCCUR EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE DED <input type="checkbox"/> RETENTION \$					EACH OCCURRENCE \$ AGGREGATE \$
	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	<input type="checkbox"/> Y <input type="checkbox"/> N <input type="checkbox"/> N/A				PER STATUTE <input type="checkbox"/> OTH-ER <input type="checkbox"/> E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Cyber Insurance		BCRS1-4032888-01	09/21/23	09/21/24	Aggregate 1,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)

CERTIFICATE HOLDER

For Information Only	CANCELLATION SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. AUTHORIZED REPRESENTATIVE
----------------------	--

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ACORD 25 (2016/03)
Theresa.Readdy@lemme.com_LEM
69884590

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PROPOSAL FORM

In completing the information questions below, if additional space is needed, attachments to this form are acceptable.

Individual ☒ Corporation Partnership Other (Specify)

Name of Organization or Individual Mauldin & Jenkins, LLC

Address 1401 Manatee Avenue W, Suite 1200 City Bradenton State FL

Zip Code 34205

Telephone Number 941-747-4483 Tax ID #

Proposer's Representative Daniel Anderson, CPA

Proposed total Audit Fee Year 1 \$ 32,500

Year 2 \$ 33,500

Year 3 \$ 34,500

Year 4 \$ 35,500

Year 5 \$ 36,500

Total \$ 172,500 (this number will be used for the purposes of scoring this RFP)

If renewed Year 6 \$ 37,500

Year 7 \$ 39,000

Year 8 \$ 40,000

Year 9 \$ 41,000

Year 10 \$ 42,000

PRICES SET FORTH ABOVE ARE FIRM PROPOSALS AND ARE NOT SUBJECT TO PRICE ADJUSTMENT UNLESS THE AGREEMENT IS AMENDED.

ATTEST: Cara Krusch PROPOSER: Daniel R. Anderson

Signature C. K.

Signature D. R. O.

Title Admin

Title Partner

Date April 2, 2024

Date 4-2-2024

ATTACHMENT B



PROCUREMENT SERVICES

EQUAL OPPORTUNITY PLEDGE

All Contractors and Suppliers must agree to the following:

- A. The Contractor/Supplier will not discriminate against any employee or job applicant because of his or her race, creed, color, sex, marital status, or national origin.
- B. The Contractor/Supplier will post in a conspicuous place, available to all employees and job applicants, a copy of this pledge.
- C. The Contractor/Supplier will, in all solicitations or advertisement for job applicants place to cause to be placed, a statement that the Contractor/Supplier is an "Equal Opportunity Employer."

Compliance with this Equal Opportunity Pledge is mandatory of all Contractors/Suppliers. Failure to sign and return this pledge may result in your Contract/order being canceled, voided or suspended in part or whole.

Mauldin & Jenkins, LLC as a Contractor/Supplier, for the Town of Manalapan, Florida pledges itself to support and abide by this Equal Opportunity Pledge.


AUTHORIZED SIGNATURE

1401 Manatee Avenue West, Suite 1200
ADDRESS

Bradenton, FL 34205
CITY STATE ZIP

4-2-2024
DATE SIGNED



BID CERTIFICATION

() Individual () Partnership
(X) Corporation () Other (Specify)

Name of Company (or Individual): Mauldin & Jenkins, LLC

Address: 1401 Manatee Avenue West, Suite 1200, Bradenton, FL 34205

Telephone Number: 941-747-4483 Fax Number: 941-747-6035

Email Address: danderson@mjcpa.com

Tax Identification #: 58-0692043 Addenda Received: 0

Bidder's Representative: Daniel R. Anderson, CPA

Title: Partner

Proposed Total Fee to Provide Requested (Years 1-5) Service:
\$ 172,500



The undersigned certified under oath the truth and correctness of all statements and of all answers to questions made hereinafter:

IN WITNESS WHEREOF, the Proposer hereto has executed this Bid Certification Form this 2nd day of April, 2024.

(CORPORATE SEAL)

ATTEST:

BIDDER:

<u>Cara Krusch</u>	<u>Daniel R. Anderson</u>
Printed Name	Printed Name
<u></u>	<u></u>
Signature	Signature Authorized Officer

Admin _____ Partner _____
Title _____ Title _____

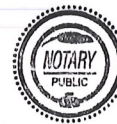
April 2, 2024 _____ 4-2-2024 _____
Date _____ Date _____

State of Florida
County of Manatee

On this the 2ND day of APRIL, 2024, before me, the undersigned
Notary Public of the State of Florida, personally appeared
DANIEL R. ANDERSON (Name(s) of Individual(s) who
appeared before Notary) and whose name(s) is/are subscribed to within instrument, and
he/she/they acknowledge that he/she/they executed it.

WITNESS my hand and official seal _____
NOTARY PUBLIC
STATE OF FLORIDA

Personally known to me: ✓
Produced Identification: _____
Type of Identification Produced: _____



RACHEL O. KEENER
Notary Public - State of Florida
Commission: HH 433512
Expires: 08/18/2027



DRUG-FREE WORKPLACE FORM

The undersigned firm in accordance with Section 287.087, Florida Statutes,

hereby certifies that Mauldin & Jenkins, LLC DOES/DOES NOT.
(Name of Business) (Circle appropriate response)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace, specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the danger of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, and any available drug counseling.

By: D J R A
Signature Authorized Officer

Date: 4-2-2024

E-VERIFY

UNITED STATES LAW REQUIRES COMPANIES TO EMPLOY ONLY INDIVIDUALS WHO MAY LEGALLY WORK IN THE UNITED STATES – BOTH U.S. CITIZENS AND FOREIGN CITIZENS WITH THE NECESSARY AUTHORIZATION. OUR DIVERSE WORKFORCE CONTRIBUTES GREATLY TO THE VIBRANCY AND STRENGTH OF OUR ECONOMY, BUT THAT SAME STRENGTH ALSO ATTRACTS UNAUTHORIZED EMPLOYMENT. E-VERIFY IS AN INTERNET BASED SYSTEM THAT ALLOWS BUSINESSES TO DETERMINE ELIGIBILITY OF THEIR EMPLOYEES TO WORK IN THE UNITED STATES. E-VERIFY IS FAST, FREE AND EASY TO USE. IT IS THE BEST WAY FOR EMPLOYERS TO ENSURE THE PROVISION OF A LEGAL WORKFORCE.

VISIT: U.S. CITIZENSHIP AND IMMIGRATION SERVICES ONLINE TO ENROLL IN E-VERIFY.

UPON ACCEPTANCE OF A BID OR PROPOSAL, THE FOLLOWING PROVISION SHALL BE DEEMED PART OF ANY CONTRACT OR AGREEMENT FOR SERVICES AUTHORIZED BY THE TOWN OF MANALAPAN:

"THE CONTRACTOR SHALL BE ENROLLED IN AND SHALL VERIFY THE WORK ELIGIBILITY STATUS OF ALL EMPLOYEES WORKING FOR THE TOWN PURSUANT TO THIS AGREEMENT, INCLUDING SUBCONTRACTORS AND THEIR EMPLOYEES, THROUGH THE E-VERIFY PROGRAM, OPERATED AND MAINTAINED BY THE UNITED STATES DEPARTMENT OF HOMELAND SECURITY AND THE SOCIAL SECURITY ADMINISTRATION."

AFFIDAVIT OF E-VERIFY COMPLIANCE

COMES NOW Daniel R. Anderson, who being duly sworn states as follows:

1. I am an adult, over 18 years of age, and legally competent.
2. I have personal knowledge of the information contained in this Affidavit.
3. I hold the position of Partner (your title or position) with Mauldin & Jenkins, LLC (name of company), and I am authorized by said company to make the statements contained in this Affidavit.
4. Mauldin & Jenkins, LLC (name of company) is presently enrolled in and participating in the E-Verify program operated and maintained by the United States Department of Homeland Security and Social Security Administration.
5. Mauldin & Jenkins, LLC (name of company) has screened its employees through E-Verify and has determined that it does not employ unauthorized workers.

STATE OF FLORIDA)
 Manatee)
COUNTY OF ~~PALM BEACH~~) ss:

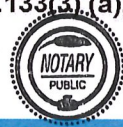
D R A

Sworn and subscribed before me by DANIEL R. ANDERSON, who is personally known to me, or who produced a Florida Driver's License as identification, this 2ND day of APRIL, 2024.

My Commission Expires: 08/18/2027

Rachel O. Keener
, Notary Public

SWORN STATEMENT PURSUANT TO SECTION 287.133(3) (a),



RACHEL O. KEENER
Notary Public - State of Florida
Commission: HH 433512
Expires: 08/18/2027

FLORIDA STATUTES ON PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED AND SWORN TO IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER OFFICIAL AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted to Town of Manalapan, Florida
(Print name of the public entity)

by Daniel R. Anderson, Partner
(Print individual's name and title)

for Mauldin & Jenkins, LLC
(Print name of entity submitting sworn statement)

Whose business address is 1401 Manatee Avenue West, Suite 1200, Bradenton, FL 34205

and (if applicable) its Federal Employer Identification Number (FEIN) is
58-0692043 (If the entity has no FEIN, include the Social Security
Number of the individual signing this sworn statement _____)
2. I understand that a "public entity crime" as defined in Paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or of the United States, including, but not limited to, any bid or contract for goods or services to be provided to any public entity or an agency or political subdivision of any other state or of the United States and involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misrepresentation.
3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in any federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, no jury trial, or entry of a plea of guilty or nol contendere.
4. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida Statutes, means:
 1. A predecessor or successor of a person convicted of a public entity crime: or
 2. Any entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in the State of Florida during the preceding 36 months shall be considered an affiliate.
5. I understand that a "person" as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts for the provision of goods or services let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an entity.
6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (indicate which statement applies)

X Neither the entity submitting this sworn statement, nor any of its officers, directors, executives, partners, shareholders, employees, members or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of its officer's directors, executives, partners, shareholders, employees, members or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of its officer's directors, executives, partners, shareholders, employees, members or agents who are active in the management of the entity, nor any affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989. However, there has been a subsequent proceeding before a Hearing Officer of the State of Florida, Division of Administrative Hearings and the Final Order entered by the Hearing Officer determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (Attach a copy of the final order)

I UNDERSTAND THAT THE SUBMISSION OF THIS FORM TO THE CONTRACTING OFFICER FOR THE PUBLIC ENTITY IDENTIFIED IN PARAGRAPH 1 (ONE) ABOVE IS FOR THAT PUBLIC ENTITY ONLY AND THAT THIS FORM IS VALID THROUGH DECEMBER 31 OF THE CALENDAR YEAR IN WHICH IT IS FILED. I ALSO UNDERSTAND THAT I AM REQUIRED TO INFORM THE PUBLIC ENTITY PRIOR TO ENTERING INTO A CONTRACT IN EXCESS OF THE THRESHOLD AMOUNT PROVIDED IN SECTION 287.017, FLORIDA STATUTES FOR CATEGORY TWO OF ANY CHANGE IN THE INFORMATION CONTAINED IN THIS FORM.

D R C

(Signature)

4-2-2024

(Date)

STATE OF Florida
COUNTY OF Manatee

PERSONALLY APPEARED BEFORE ME, the undersigned authority, DANIEL R. ANDERSON
(Name of individual signing)

who, after first being sworn by me, affixed his/her signature in the space provided above on this

2nd day of APRIL, 2024

Rachel O. Keener

(NOTARY PUBLIC)

My Commission expires:

8/18/2027



RACHEL O. KEENER
Notary Public - State of Florida
Commission: HH 433512
Expires: 08/18/2027

CERTIFICATION PURSUANT TO FLORIDA

STATUTE § 287.135

I, Daniel R. Anderson, on behalf of Mauldin & Jenkins, LLC certify
 Print Name and Title Company Name

That Mauldin & Jenkins, LLC does not:
 Company Name

1. Participate in a boycott of Israel; and
2. Is not on the Scrutinized Companies that Boycott Israel List; and
3. Is not on the Scrutinized Companies with Activities in Sudan List; and
4. Is not on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List; and
5. Has not engaged in business operations in Syria.


Submitting a false certification shall be deemed a material breach of contract. The Town shall provide notice, in writing, to the Contractor of the Town's determination concerning the false certification. The Contractor shall have ninety (90) days following receipt of the notice to respond in writing and demonstrate that the determination of false certification was made in error. If the Contractor does not demonstrate that the Town's determination of false certification was made in error then the Town shall have the right to terminate the contract and seek civil remedies pursuant to Florida Statute § 287.135.

Section 287.135, Florida Statutes, prohibits the Town from: 1) Contracting with companies for goods or services in any amount if at the time of bidding on, submitting a proposal for, or entering into or renewing a contract if the company is on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, F.S. or is engaged in a boycott of Israel; and

2) Contracting with companies, for goods or services over \$1,000,000.00 that are on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector list, created pursuant to s. 215.473, or are engaged in business operations in Syria.

As the person authorized to sign on behalf of the Contractor, I hereby certify that the company identified above in the section entitled "Contractor Name" does not participate in any boycott of Israel, is not listed on the Scrutinized Companies that Boycott Israel List, is not listed on either the Scrutinized Companies with activities in the Iran Petroleum Energy Sector List and is not engaged in business operations in Syria. I understand that pursuant to section 287.135, Florida Statutes, the submission of a false certification may subject the company to civil penalties, attorney's fees, and/or costs. I further understand that any contract with the Town for goods or services may be terminated at the option of the Town if the company is found to have submitted a false certification or has been placed on the Scrutinized Companies with Activities in Sudan list or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List.

Mauldin & Jenkins, LLC
 COMPANY NAME


 SIGNATURE

Daniel R. Anderson
 PRINT NAME

Partner
 TITLE

ADDENDA ACKNOWLEDGEMENT

TOWN OF MANALAPAN, FLORIDA

RFP TITLE: "ANNUAL AUDIT SERVICES"

RFP NO.: 24-001

DATE SUBMITTED: April 2, 2024

We propose and agree, if this submittal is accepted, to contract with the Town of Manalapan, in the Contract Form, to furnish all material, means of transportation, coordination, labor and services necessary to complete/provide the work specified by the Contract documents.

Having studied the documents prepared by: The Town of Manalapan

We propose to perform the work of this Project according to the Contract Documents and the following addenda which we have received:

ADDENDUM	DATE	ADDENDUM	DATE
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

X NO ADDENDUM WAS RECEIVED IN CONNECTION WITH THIS RFP

REFERENCES FOR <u>Mauldin & Jenkins, LLC</u>		
(NAME OF FIRM)		
1.Owner/Client Name:		
Village of Tequesta, Florida		
Name and Location of Project:		
Preparation of ACFR and Certificate of Achievement awarded by the GFOA. Audit of three single employer DB pension plans.		
Phone:	Fax:	E-Mail:
561.768.0424	561.768.0699	jsnyder@tequesta.org
1.Owner/Client Name:		
Town of Jupiter Inlet Colony, Florida		
Name and Location of Project:		
Preparation of ACFR		
Phone:	Fax:	E-Mail:
561.746.3787	561.746.1068	lucask@jupiterinletcolony.org
1.Owner/Client Name:		
City of North Port, Florida		
Name and Location of Project:		
Preparation of ACFR & Certificate of Achievement awarded by the GFOA		
Phone:	Fax:	E-Mail:
941.429.7108	941.429.7209	sskipper@cityofnorthport.com



Going Further.

No matter what road you're on, we are here to help you navigate through your unique circumstance to reach your financial goals.

INTEGRITY.

100+ year history of
quality & expertise

INNOVATION.

Continued advancements,
opportunities & solutions to
drive us into the **future**

INSPIRATION.

A **culture** guided by our
vision of service and
community



www.mjcpa.com

RFP No.: 24-001

SUMMARY OF REVIEWERS SCORES - EVALUATION COMMITTEE MEETING (RANKING) - 4/12/24 at 2:00 PM

	Profile of the Proposer	Ability to Furnish Required Services		Ability of Personnel	Experience	Total Audit Fees Over 5 Year Period		Individual Score Totals	TOTALS	RANK
		MAX - 10	MAX - 25			MAX - 25	MAX - 25			
	Carr, Riggs & Ingram									
	John Deese	5.00	20.00	15.00	15.00	11.91	11.91	11.91	232.73	4
	Greg Dunham	5.00	20.00	17.00	20.00	11.91	11.91	73.91		
	David Dillena	10.00	25.00	20.00	25.00	11.91	11.91	91.91		
	Grau & Associates					15.00	15.00	15.00		
	John Deese	5.00	15.00	15.00	15.00	15.00	15.00	65.00	239.00	3
	Greg Dunham	7.00	20.00	22.00	23.00	15.00	15.00	87.00		
	David Dillena		20.00	20.00	25.00	15.00	15.00	87.00		
	Marcum					8.48	8.48	8.48		
	John Deese	10.00	20.00	15.00	15.00	8.48	8.48	68.48	247.44	2
	Greg Dunham	10.00	23.00	21.00	23.00	8.48	8.48	85.48		
	David Dillena	10.00	25.00	25.00	25.00	8.48	8.48	93.48		
	Mauldin & Jenkins					11.73	11.73	11.73		
	John Deese	10.00	25.00	20.00	20.00	11.73	11.73	86.73	266.19	1
	Greg Dunham	9.00	23.00	21.00	22.00	11.73	11.73	86.73		
	David Dillena	10.00	25.00	21.00	25.00	11.73	11.73	92.73		



TOWN OF MANALAPAN AGENDA ITEM SUMMARY

Meeting Date: April 23rd, 2024

Agenda Item No.: RA 3

Agenda Item Name: Town Manager Stumpf's Report

ACTION REQUESTED: Discussion ☐ Action ☐

BACKGROUND:

- Code enforcement log
- Lands End Road Cul de Sac update
- Water Plant
- Library