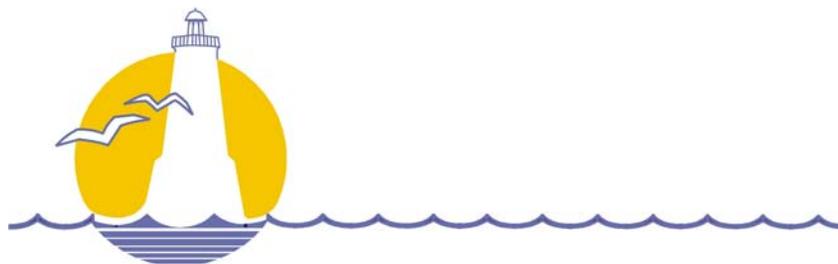


**REQUEST FOR PROPOSAL**  
**FOR**  
**ASSESSMENT SERVICES**  
**FOR THE**  
**CITY OF FOND DU LAC, WISCONSIN**

**ISSUED NOVEMBER 9, 2011**

**DUE DATE: DECEMBER 2, 2011, AT 11:00 AM**



CITY OF FOND DU LAC  
REQUEST FOR PROPOSAL FOR  
ASSESSMENT SERVICES  
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# I. INTRODUCTION

## Purpose of Document

The City of Fond du lac is requesting proposals (RFP's) from qualified assessment firms to provide annual assessment services for the City of Fond du Lac, Wisconsin (hereafter, referred to as "City") for the years 2012 (final eleven months) through 2016. The City is seeking a firm to serve as its statutory assessor and to provide annual maintenance work in a competent, timely, efficient, cost effective and customer service-oriented manner.

## Background Information

The City, with a 2011 population of 43,075, is located in Fond du Lac County. The 2011 Equalized Value (including manufacturing and TID) for the City is \$2,696,595,500. The City has eight active Tax Incremental Financing Districts. The assessment ratio for 2010 was 0.966035006.

The City has the following parcel counts (from 2010 Statement of Assessment):

|                     | <u>Total Land</u> | <u>Improvements</u> |
|---------------------|-------------------|---------------------|
| Residential         | 13,382            | 12,708              |
| Commercial          | 1,264             | 1,094               |
| Manufacturing       | 104               | 102                 |
| Agricultural        | 159               | 0                   |
| Undeveloped         | 58                | 0                   |
| Agricultural Forest | 6                 | 0                   |
| Forest Lands        | 6                 | 0                   |
| Other               | <u>2</u>          | <u>2</u>            |
| Total               | 14,981            | 13,906              |

Personal Property Accounts: 2,085. Personal Property includes buildings on leased land, double-wide mobile homes and boathouses.

A City-wide market revaluation was completed in 2010.

## Due Date of Proposal

Proposals are due in City Administrative offices to the attention of Eileen Baus, Purchasing Agent, by 11:00 AM on December 2, 2011. The effective date when the contract work is to begin is February 1, 2012.

## Cost of Information Preparation

The costs of developing and submitting a proposal, discussions required to clarify items related to the proposal, and/or future interviews is entirely the responsibility of the applicant. All proposals and other information provided to the City become the property of the City. The City reserves the right to use such proposals and other material or information and any of the ideas presented therein without cost to the City.

## Acceptance/Rejection Process

The City may schedule discussions with firms submitting proposals if it becomes necessary to clarify elements of the proposal. The City will award the contract for

assessment services based upon the proposal that the City determines is in the best interests of the City.

**The City reserves the right to reject any and/or all proposals received. The City will reject any proposal that does not meet all of the terms, services and conditions requested in this RFP.**

#### Amendments and Withdrawal

The City reserves the right to amend or withdraw this RFP at any time at its sole discretion prior to the due date of the RFP. If it becomes necessary to amend any part of the RFP, an addendum will be provided. **Responders must include acknowledgment of all addenda as part of the RFP.** Any withdrawal is effective upon issuance of such notice.

The City reserves the right to retain all proposals submitted and to use any ideas in a proposal regardless of whether that proposal is selected. Submission of a proposal indicates acceptance by the respondent of the conditions contained in this RFP, unless clearly and specifically noted in a subsequent contract between the City and the firm selected.

#### Questions/Surveying Premises

No pre-proposal meetings shall be scheduled. Questions regarding desired services or general operations are to be directed to Eileen Baus, Purchasing Agent, at (920) 322-3454. All site visits must be scheduled in advance and confirmed by contacting the Purchasing Agent by phone or e-mail ([eba@fdl.wi.gov](mailto:eba@fdl.wi.gov)).

Applicants are encouraged to carefully inspect the community and facilities of the City, and judge for themselves, the circumstances affecting the cost of the work and the time requirements for its completion. Failure to do so will not relieve the assessor of the obligation to furnish and perform the work, to carry out the provisions of the contract or to complete the contemplated work for the consideration set forth in the proposal in a timely manner.

#### Term of Engagement

This proposal is for the term beginning February 1, 2012 and expiring December 31, 2016.

## **II. TIME REQUIREMENTS**

The following is a list of key dates up to and including the date proposals are due to be submitted:

|  |                                      |
|--|--------------------------------------|
| Request for proposal issued:             | <b>November 9, 2011</b>              |
| Due date for proposals:                  | <b>December 2, 2011 (11:00 a.m.)</b> |
| Selected firm notified (anticipated):    | <b>December 16, 2011</b>             |
| Coverage beginning date (no later than): | <b>February 1, 2012</b>              |

### III. SPECIFIC SERVICES REQUIRED

1. Assessor will perform all of the work required to properly and professionally assess the real and personal property of the City in accordance with applicable Wisconsin State Statutes and in full compliance with all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue. The assessor shall designate a qualified and responsible employee to supervise the operation of the assessor's staff for the entire contract period. The individual shall be certified (at a minimum) Assessor Level II or Assessor Level III. The individual designated as such shall be available to the City for the entire contract. Should the project supervisor be reassigned, that person shall be replaced by an equally qualified individual, subject to review and approval of the City.

The assessor shall report to and be accountable to the City's Director of Administration or his/her designee. The assessor shall meet with the Director of Administration on a regular (weekly) basis to discuss the progress of the work and to review the data and the reports completed. The City reserves the right to inspect the data and the progress of the work performed at any time without limitation.

2. Assessor and his/her City-approved designee will maintain regular office hours at the Fond du Lac City-County Government Center, 160 South Macy Street from 7:45 AM to 4:30 PM Monday through Friday (as further explained in paragraph 22). Additional hours should be planned after assessment notices are sent out, during the open book review, and prior to the Board of Review.
3. The assessor shall be responsible all assessment related clerical duties including:
  - Answering routine telephone calls
  - Walk-in requests for assessment data
  - Assist in scheduling assessment-related appointments
  - Providing copies of all assessment-related open records requests
  - Preparing appointment mailers, stuffing envelopes and mailing all notices
  - Filing of all assessment property records cards and any other assessment-related records
  - All assessment data entry
4. Assessor will provide a local phone number for City officials and residents to contact the assessor during regular business hours, Monday through Friday, and shall return calls within twenty-four (24) hours.
5. Assessor will field review and assess all properties that were under partial construction as of January 1<sup>st</sup> of the previous year.
6. Assessor will field review and assess new construction as of January 1<sup>st</sup> of the current year.
7. Assessor will perform interior inspections on all newly constructed homes, partially constructed homes from the previous year, any interior remodeling including kitchen, bath, basement remodeling and additions.

8. Assessor will field visit and measure all properties with building permits for exterior remodeling and for detached buildings and decks, air conditioning and other miscellaneous permits.
9. The assessor will field review as deemed necessary sale properties and properties for which no building permit has been issued.
10. The assessor will be diligent in discovering and assessing all personal property. Assessor will field visit all personal property accounts annually to discover new accounts and account for business that may have closed prior to the assessment year. Assessor will cross reference personal property account with the corresponding real property and parcel number.
11. The assessor will mail out State approved Personal Property Forms to all holders of personal property in the City by January 15<sup>th</sup> of each year, audit the returned forms, and place the new values in the assessment roll. Assessor will collect the name and address of each personal property contact person, separate from the business name. The assessor shall provide a doorage listing to the Director of Administration prior to open book review.
12. Assessor will account for all buildings destroyed or demolished.
13. Assessor will implement use value assessments of agricultural lands per specifications set forth by the Wisconsin Department of Revenue.
14. The assessor will be responsible for determining whether an organization or individual meets the requirements for exemption in determining a property's tax exempt status.
15. Assessor will process parcel subdivisions, lot line adjustments, new subdivision plats, certified survey maps and any other land divisions.
16. Assessor will take digital photographs of new construction on or about January 1<sup>st</sup> annually, and also during the review process if needed.
17. Assessor will maintain and annually update property owner lists, with current name and address changes.
18. Assessor will post assessments to real estate transfer returns and record sale information to property record cards electronically.
19. Assessor will annually update all property owner record cards with new legal descriptions electronically.
20. Assessor will be responsible for maintaining plat and section/cadastral maps on file and update yearly.
21. Assessor will mail Notice of Assessment to property owners and others as required by State Statutes.

22. Assessor will conduct open book sessions in accordance with Wisconsin State Statutes. Assessor shall prepare a written statement regarding open book dates, times, and instructions on how to set up an appointment for an open book session, at least fifteen (15) days prior to the first open book session. The assessor shall notify the local press for publication prior to open book.
23. The assessor will be responsible for preparing for the annual Board of Review hearing proceedings as required by State Statutes prior to May of each year. The assessor shall work with the City Clerk to arrange for the hearings. The assessor will attend the Board of Review hearings, serve as City staff at the hearings and defend the assessor's valuations and work products. The assessor will promptly and adequately follow up and respond to any appeals made at the Board of Review hearing, incorporating assessment modifications as approved.
24. The assessor shall update the City's assessment computer records within fourteen (14) days of the final adjournment of the Board of Review.
25. The assessor will be responsible for providing the Wisconsin Department of Revenue with final reports as required by the DOR.
26. The assessor will value all mobile homes as required by law.
27. The assessor will value all boathouses as required by law.
28. Assessor will coordinate with the Fond du Lac County Real Property Listing office to facilitate the digital and manual transfer of data and values.
29. Assessor will provide a website that will be linked to the City's website to place the computer property assessment records on the web for access to the public.
30. The assessor shall update market values on City owned land and public buildings annually. Said information obtained shall be used for insurance purposes, depreciation and to establish lease values.
31. The assessor shall also perform all other duties incidental to the normal duties of the assessor.
32. The assessor will be required to provide 100% performance bond or stand-by letter of credit to the City prior to the start of the contract in the amount of the full contract price.
33. All assessment files and records created and data collected by the assessor shall remain the property of the City. Records shall not be removed from City premises without the written permission of the City.
34. The assessor shall be available to attend, upon the request of the Director of Administration, department head, City Council or other prescribed meetings upon reasonable prior notice. Such meetings are expected to average two (2) hours per month.

35. The assessor shall communicate openly and in a timely manner with proper City personnel and the public regarding assessment matters. The assessor is encouraged to interface with the business and residential community and the media to provide greater clarity of the assessor's role in the property taxation and valuation process.
36. The assessor is expected to present a positive, professional image in both dress and conduct while interfacing with City staff and the public.
37. All assessment personnel shall carry proper photo identification to assure the public of their identity and purpose for gaining access to private property.
38. The assessor is not permitted to assign, subcontract or transfer the work without the written permission of the City.
39. All personnel providing services requiring Wisconsin Department of Revenue Certificates shall be currently certified in compliance with Wisconsin Statute 70 and Administrative Rules of the Wisconsin Department of Revenue.
40. The assessor will provide and update the City with a listing of all personnel assigned. All personnel shall be approved by the City. Copies of each employee's certificate shall be supplied to the City.
41. The assessor shall review any complaint relative to the conduct of his/her employee(s). If the City deems the performance of any of the assessor's employees to be unsatisfactory, the assessor shall remove such employee(s) from working for the City upon written request from the City.
42. The assessor shall maintain insurance coverage to protect against claims, demands, actions and causes of action arising from any act, error or omission of the assessor, their agents and employees in the execution of work. Further, the assessor shall be responsible for any and all of their agents while performing acts under the terms of this contract. Certificates of insurance by a company authorized to transact business in the State of Wisconsin shall be supplied to the City, listing the City as an additional insured.  
Limits of Liability shall not be less than:
  - a. Workers compensation statutory limits
  - b. Comprehensive general liability, including personal injury and blanket contractual liability in the amount of \$1,000,000 per occurrence, combined single limit
  - c. Comprehensive auto liability, including property damage and non-ownership coverage in the amount of \$1,000,000 per occurrence, combined single limit
43. The assessor agrees to carry proper and sufficient insurance to cover loss of the City's records, as well as assessor's records in process under this agreement which are in possession of the assessor. The assessor shall not be responsible for loss of records accidentally destroyed by fire, theft, or Act of God while kept in office space supplied by the City.

44. The assessor shall be responsible for the proper completion of the assessment roll in accordance with State law. Final assessment figures for each property shall be provided by the assessor to Fond du Lac County on the County's forms, and the roll shall be totaled to exact balance between the county and the assessor. The assessor shall prepare and submit the Municipal Assessment Report (MAR) and the TID Assessment Reports to the Department of Revenue in a timely manner.
45. The assessor shall insure that employees maintain strict confidence regarding all privileged information received by reason of this contract. Disclosure of this or any appraisal information to any individual, firm, or corporation other than appropriate public officials or their authorized agents is expressly prohibited.
46. The assessor shall supply all necessary office machines and equipment such as, but not limited to, computers, calculators, typewriters, adding machines, and copy machines.
47. All office supplies, postage, cards and other materials and supplies necessary to perform the duties of the contract shall be the responsibility of the assessor.
48. The successful assessor shall be required to execute a contract with the City that incorporates the information included in this RFP.

#### **IV. ASSESSMENT SOFTWARE**

The City of Fond du lac owns and uses MAS assessment software marketed by Tyler Technologies. All of the initial setup work has been completed (names, addresses, current and prior assessment values and class, and sales data). The City would prefer the assessor use and maintain assessment data in the current software system. The current assessment software has the following attributes/abilities:

1. Have statistical package that includes descriptive statistics and regression analysis. The firm should be able to state that the values produced from the system are created from regression analysis and identify clients that have used these essential tools for valuation.
2. Comparative sales reports that can be used to support individual assessments with adjustments shown to be derived from the regression analysis.
3. Flexible cost and depreciation tables that can be adjusted to capture specific markets. For commercial properties, a system generated income approach to value.
4. Has the ability to electronically export the completed assessment role to the Fond du Lac County Real Property Listing office in the format required. This eliminates any manual data entry of the completed roll.
5. The ability to import "start-up data" from the Fond du Lac County Real Property Listing office. This would also be used to set up the City's computerized system, to avoid time/cost consuming initial data entry. Typical imported data would include owners name(s), mailing address, parcel address, legal description, parcel number, etc.
6. Building permit record keeping.

7. Sales data that can be kept, stored and accessed.
8. Maintains an ownership history.
9. Maintains a separate sales listing file to record and store data on sale properties as of the date of sale.
10. Has the ability to create a wide range of reports, including Assessment Roll, Assessor's Final Report, and neighborhood attributes and values.
11. Has the ability to run queries to locate specific data.
12. Has an electronic sketch for each property.
13. Uses standard database format, such as Microsoft Access, that can be read or easily converted to be read by other software packages.
14. Assessor will annually provide the City with a copy of the database used, together with file maps and descriptions, and all associated digital photos. This database will become the property of the City.
15. Hard copy printouts for all parcels shall be provided and placed in existing hardcopy property record cards. The printout's format and data provided shall be approved by the Department of Revenue and should contain the same data fields as shown on the PA-500 property record card as a minimum.
16. The data should be capable of being uploaded to the City's GIS system.

## **V. CITY OBLIGATIONS**

1. The City shall furnish adequate space at the Fond du Lac City-County Government Center at no cost to the assessor. Office space may include desks, tables, chairs, file cabinets, heating, lighting, telephone and janitorial services, but shall not include other office machinery, equipment and computers.
2. The City shall allow access by the assessor to City records including, but not limited to, prior assessment rolls, sewer and water layouts, building permits, tax records, building plans, records of special assessments, plats or any other maps and property files at no cost.
3. The City shall furnish the name and address of the owner and the block and lot number size or other identifying description of each parcel to be appraised.
4. The City shall furnish the name and correct address of the owner and block and lot number size or other identifying description of each parcel to be appraised.
5. The City shall furnish the name and correct address, if know, to the assessor for notices to be sent for changes in assessed values.

6. The City shall aid the assessor with a reasonable promotion of public information concerning the work under this agreement.

## **VI. GENERAL PROPOSAL REQUIREMENTS**

1. Five (5) copies of proposal shall include no more than twenty-five (25) pages, 8 ½ inches by 11 inches. At least one proposal shall be unbound and single sided.
2. All proposals must identify the firm name, address and specific assessment service experience in Wisconsin. The proposals shall also include: the names, educational background and municipal assessment experience of the person or persons to be assigned as the City's point of contact for the work to be performed; experience with conducting a revaluation process; identify experience with assessment evaluation of potential tax-exempt properties, demonstrate accuracy of assessment work.
3. Complete and submit a copy of Exhibit A with your proposal. Please, list only Wisconsin municipalities with a population greater than 20,000 for which your firm currently provides assessment services. Please indicate whether your firm provides the municipality with general annual assessment services, revaluation services, or both.
4. The proposal shall include the total annual compensation rate to provide the assessment services described in the above "Specific Services Required" and in accordance with the laws of the State of Wisconsin for assessment years 2011, 2012, 2013, 2014 and 2015, beginning not later than February 1, 2012. The City will pay the annual compensation pro-rata on a monthly basis.
5. Proposals shall clearly list the fee for each year of the proposed contract (2012, 2013, 2014, 2015 and 2016) in a not-to-exceed sum to include all of the assessor's costs including but not limited to: labor, materials, supplies, equipment, transportation costs, meals, lodging, computer software and Board of Review expenses. All expense reimbursements will be the responsibility of the firm.
6. The assessor will be allowed to propose alternate office hours to those specified in the RFP if significant savings and/or benefits may result for the City as part of an alternate quote. However, the basic proposal must include all stated requirements in this RFP including staffing for the regular office hours listed in the RFP.
7. The assessors shall provide a cost for a future revaluation of City property. The assessor shall have successfully completed a revaluation in a municipality of similar size and stature. The assessor shall have Assessor Level II or higher staff competent to perform such a revaluation of commercial and residential property.
8. All work shall be accomplished in accordance with the provisions of the laws of the State of Wisconsin and in full compliance with the rules and regulations promulgated by the Wisconsin Department of Revenue.
9. The proposal shall identify five references from Wisconsin municipal clients of a size similar to the City of Fond du Lac for which the assessor and the person/persons to be assigned as the City's point of contact for the work to be performed and has provided

assessment and/or revaluation services with the past two (2) years. References must include the name, title, address and business phone number of the contact person.

10. Assessors shall provide a detailed resume of the person or persons assigned as the City's statutory assessor/point of contact for the work to be performed.
11. All personnel providing assessing services shall be currently certified in compliance with Wisconsin State Statutes and Administration rules of the Wisconsin Department of Revenue, and shall maintain certification throughout the duration of the assignment.
12. Assessors are advised to carefully inspect the community, the assessment records and facilities of the City of Fond du Lac and examine the above referenced specifications for the proposed work and judge for themselves the circumstances affecting the cost of the work or the time requirements for its completion. Failure to do so will not relieve the successful bidder of the obligation to furnish and perform the work, to carry out the provisions of the contract, and to complete the contemplated work for the consideration set forth in this bid on a timely basis.
13. The assessor is not permitted to assign, subcontract or transfer the work of providing assessment services, without the prior written approval of the City.
14. The successful assessor will have five years' experience in Wisconsin municipal government assessing, including re-evaluation, and will have advanced knowledge and experience in the utilization of computer applications for assessments.
15. The proposals will be reviewed and awarded to the assessor whose quote is the most responsive to the RFP and is the most advantageous to the City of Fond du Lac considering experience, price and other factors. The City reserves the right to accept or reject any and all proposals received.
16. If a proposal is accepted, the assessor shall provide a certificate of insurance naming the City as additionally insured for the purposes of general and professional liability protection. Said certificate shall be in a form and amount acceptable to the City Attorney.

The Assessor shall maintain insurance coverage to protect against claims, demands, actions and causes of action arising from any act, error or omission of the Assessor, their agents and employees in the execution of work. Further, the Assessor shall be responsible for any and all of their agents and employees while performing acts ostensibly under the terms of this contract. Certificates of Insurance by a company authorized to transact business in the State of Wisconsin shall be supplied to the City, listing the City as an additional insured.

Limits of Liability shall not be less than:

- a) Worker's compensation Statutory Limits
- b) Comprehensive general liability, including personal injury and blanket contractual liability in the amount of \$1,000,000 per occurrence, combined single limit.
- c) Comprehensive auto liability, including property damage and non-ownership coverage in the amount of \$1,000,000 per occurrence, combined single limit.

17. This proposal may not be withdrawn for a period of sixty (60) days after the date and time set for the opening of bids. Any company may withdraw its proposal at any time prior to the submittal deadline.

## **VII. OTHER INFORMATION**

The “sealed” original and five (5) copies of the Assessment Services Proposal must be received at the address listed below by no later than 11:00 AM on December 2, 2011. Sealed envelopes shall be marked: Assessor Services Proposal

Proposals shall be submitted to:

Eileen Baus  
Purchasing Coordinator  
City of Fond du Lac  
160 South Macy Street  
PO Box 150  
Fond du Lac WI 54936-0150

## **VIII. EVALUATION CRITERIA**

The following evaluation criteria will be used to review the Assessment Services Proposals that are received and which meet the RFP specifications requirements:

1. Demonstration of successful experience in providing general assessment services and assessment software to Wisconsin municipalities of similar size as the City of Fond du Lac.
2. Past experience with providing assessment and revaluation services.
3. Ability to provide and maintain a computerized database of property assessment records.
4. Demonstration of a high level of accuracy in assessment work for municipal clients.
5. Cost of Assessment Services.
6. Evidence of positive customer interaction.

## **IX. FINAL SELECTION**

The City Manager of the City of Fond du Lac will select an assessment firm based upon the recommendation of the Director of Administration. It is anticipated that a firm will be selected on approximately December 5, 2011. Following notification of the respondent selected, it is expected a contract will be executed between both parties prior to December 31, 2011. It is anticipated that the work under the contract will begin on February 1, 2012. This Request for Proposal will serve as the basis of the initial services contract with the firm that is selected.

## **X. RIGHT TO REJECT PROPOSALS**

By responding to this RFP an individual respondent accepts the process outlined in this RFP and fully acknowledges that the final determination of the City of Fond du Lac is binding and without appeal.

The City reserves the right to reject any or all proposals, without prejudice and/or waive any irregularities if deemed in the best interests of the City. In addition, the City reserves the right to reissue all or part of this Request for Proposal and/or not award any contract at its discretion and without penalty.

The City of Fond du Lac reserves the right to accept the proposal considered most advantageous to the City, which, in its opinion, meets the specifications of the RFP regardless of whether or not the terms are the lowest cost.

*All respondents accept the preceding terms and procedures in submitting a proposal.*

**Exhibit A**  
**City of Fond du Lac**  
**Request for Proposal for Assessment Services**  
**List of Current Wisconsin Municipal Assessment Clients over 20,000 Population**

| Name of Municipality | Population | Equalized Value | General Assessment Services                              | Revaluation Services                                     |
|----------------------|------------|-----------------|--|--|
|                      |            |                 | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                      |            |                 | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                      |            |                 | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                      |            |                 | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                      |            |                 | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
|                      |            |                 |  |  |
|                      |            |                 |  |  |

Name of Firm:

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Address of Firm:

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Signature of Preparer:

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