

**FORT PIERCE REDEVELOPMENT AGENCY  
CRA ADVISORY COMMITTEE**

CRA Regular Meeting - Wednesday, January 20, 2016 - 2:00 p.m.

City Hall - Third Floor Conference Room, 100 North U.S. #1, Fort Pierce, Florida

1. **CALL TO ORDER**
2. **ROLL CALL**
3. **APPROVAL OF MINUTES**
4. **CHAIRMAN COMMENTS**
5. **OLD BUSINESS**
  - A. Discussion of Proposed Revisions to CRA Advisory Committee By-Laws - Postponed.
6. **NEW BUSINESS**
  - A. Update by Fort Pierce Police Chief Diane Hogley-Burney.
  - B. Evaluation and Ranking of RFP No. 2016-012 for Real Estate Broker Services.
7. **PUBLIC COMMENTS**
8. **STAFF COMMENTS**
9. **ADJOURNMENT**

In accordance with the Americans with Disabilities Act and Section 286.26, Florida Statutes, persons with disabilities needing special accommodation to participate in this meeting should contact the City Clerk's Office at (772) 467-3052 at least 48 hours prior to the meeting.

**CRA Advisory Committee**

**Meeting Date:** 01/20/2016

**Re:** Discussion of Proposed  
Revisions to CRA Advisory  
Committee By-Laws

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**Information**

**SUBJECT**

Discussion of Proposed Revisions to CRA Advisory Committee By-Laws - Postponed.

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**Attachments**

CRA Advisory Committee By-Laws

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**FORT PIERCE REDEVELOPMENT AGENCY**  
**CRA ADVISORY COMMITTEE**  
**BY-LAWS**

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1. The CRA Advisory Committee will meet the 3rd Wednesday of each month. Meetings will begin at 2:00 PM and will be held in the Fort Pierce City Hall 2nd floor conference room.
2. Additional meetings may be held at any time upon the call of the Chairperson, or by a majority of the voting members of the Committee, or upon request of staff.
3. No member shall serve more than two (2) full consecutive terms (four years).
4. The Committee at its first regular meeting in June each year shall elect a Chairperson, Co-Chairperson and Secretary. No member may serve more than two (2) full consecutive terms as Chairperson.
5. The duties and powers of the officers of the CRA Advisory Committee shall be as follows:
  - a. Chairperson:
    - 1) Preside at all meetings of the Committee
    - 2) Call special meetings of the Committee in accordance with these rules and regulations
    - 3) See that all actions of the Committee are properly taken
  - b. Co-Chairperson:
    - 1) During the absence, disability, or disqualification of the Chairperson, the Co-Chairperson shall exercise or perform all the duties and be subject to all the responsibilities of the Chairperson.
  - c. Secretary:
    - 1) The Secretary shall be responsible to coordinate the taking of the minutes of the Committee with City staff, keep all approved minutes.
6. A majority of the members of the Committee entitled to vote shall constitute a quorum for the transaction of business. All recommendations from the Committee for either approval or disapproval of any agenda item shall be by a majority vote of the members of the Committee entitled to vote.
7. Robert's Rules of Order are hereby adopted for the government of the Committee in all cases not otherwise provided for in these rules.
8. These rules may be amended at any meeting by a vote of the majority of the entire membership of the Committee. Deadline for Agenda information is due to staff ten (10) days prior to meeting date in order to have an item(s) placed on upcoming agenda.



**FORT PIERCE REDEVELOPMENT AGENCY**  
**CRA ADVISORY COMMITTEE**  
**BY-LAWS**

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9. Each member of the CRA Advisory Committee who has knowledge of the fact that he/she will not be able to attend a scheduled meeting of the CRA Advisory Committee shall notify the Deputy City Manager at [nmimms@city-ftpierce.com](mailto:nmimms@city-ftpierce.com) or 772-467-3793 at the earliest possible opportunity, and in any event, prior to 12:00 PM on the date of the meeting. The Deputy City Manager shall notify the Chairperson of the Committee in the event that projected absences will produce the lack of a quorum. A quorum is half plus one of membership.
10. All Advisory Committee members are expected to attend regularly scheduled meetings. Three (3) unexcused absences by any member during any 12-month period may result in removal of the member by the Advisory Committee. A member's absence is unexcused if the member fails to notify City staff in advance of a meeting that the member will not attend the meeting.
11. The following order will normally be observed; however, it may be rearranged by the Chairperson for individual items if necessary for the expeditious conduct of the business:
  - a. Call to Order
  - b. Roll Call
  - c. Approval of Minutes
  - d. Old Business
  - e. New Business
  - f. Committee Comments
  - g. Public Comments
  - h. Staff Comments
  - i. Close
12. The Co-Chairperson shall succeed the Chairperson if he/she vacates office before term is completed; the Co-Chairperson is to serve the unexpired term of the vacated office. A new Co-Chairperson shall be elected at the next regular meeting.
14. A new Secretary shall be elected at the next regular meeting if he/she vacates office before term is completed.

**CRA Advisory Committee**

**Meeting Date:** 01/20/2016

**Re:**

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**Information**

**SUBJECT**

Update by Fort Pierce Police Chief Diane Hogley-Burney.

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**Attachments**

*No file(s) attached.*

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**CRA Advisory Committee**

**Meeting Date:** 01/20/2016

**Re:** Evaluation and Ranking for RFP  
No. 2016-012 - Real Estate  
Broker Services

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**Information**

**SUBJECT**

Evaluation and Ranking of RFP No. 2016-012 for Real Estate Broker Services.

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**Attachments**

RFP 2016-012 Evaluation Committee Ranking Sheet  
RFP 2016-012 - Keller Williams Realty - No Bid  
RFP 2016-012 - Coldwell Banker Paradise  
RFP 2016-012 - Fleischman Realty Group, LLC  
RFP 2016-012 - Higgenbotham Auctioneers International Ltd, Inc.  
RFP 2016-012 - McCurdy and Company Realty

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# RFP Evaluation Committee Ranking Sheet

RFP No. 2016-012 ~ Real Estate Broker Services  
January 20, 2016

**Respondent Name: Coldwell Banker Paradise**

CRITERIA	POINTS POSSIBLE	POINTS AWARDED
Qualifications of Proposer	20	
Fee Schedule(s)/Commission	25	
Member of Multiple Listing Service (MLS)	5	
Commercial Real Estate Experience (years, knowledge, track record)...	25	
Market Method (National/Global Reach).....	25	
Locality Rating (as per table provided)	0 - 25	
<b>TOTAL:</b>		

**Respondent Name: Fleischman Realty Group, LLC**

CRITERIA	POINTS POSSIBLE	POINTS AWARDED
Qualifications of Proposer	20	
Fee Schedule(s)/Commission	25	
Member of Multiple Listing Service (MLS)	5	
Commercial Real Estate Experience (years, knowledge, track record)...	25	
Market Method (National/Global Reach).....	25	
Locality Rating (as per table provided)	0 - 25	
<b>TOTAL:</b>		

**Respondent Name: Higgenbotham Auctioneers International Ltd, Inc.**

CRITERIA	POINTS POSSIBLE	POINTS AWARDED
Qualifications of Proposer	20	
Fee Schedule(s)/Commission	25	
Member of Multiple Listing Service (MLS)	5	
Commercial Real Estate Experience (years, knowledge, track record)...	25	
Market Method (National/Global Reach).....	25	
Locality Rating (as per table provided)	0 - 25	
<b>TOTAL:</b>		


**Respondent Name: McCurdy & Company Realty**

CRITERIA	POINTS POSSIBLE	POINTS AWARDED
Qualifications of Proposer	20	
Fee Schedule(s)/Commission	25	
Member of Multiple Listing Service (MLS)	5	
Commercial Real Estate Experience (years, knowledge, track record)...	25	
Market Method (National/Global Reach).....	25	
Locality Rating (as per table provided)	0 - 25	
<b>TOTAL:</b>		

**Locality Rating** - In purchasing of, or letting of contracts for procurement of, personal property, materials, contractual services, and construction of improvements to real property or existing structures for which a request for proposals is developed with evaluation criteria, the locality rating evaluation score shall be assigned as follows:

**LOCALITY RATING TABLE**

LOCATION DESCRIPTION	RATING
Headquartered within the City of Fort Pierce	25
Headquartered within the four counties (St. Lucie, Martin, Okeechobee,	20
Satellite office in four counties (St. Lucie, Martin, Okeechobee, and Indian River)	15
Office located in State of Florida	10
Office located outside of Florida	0
<i>Proposing firms can only receive a score from <b>one</b> of the above categories.</i>	

<p><b>DELIVER TO:</b>  City of Fort Pierce  100 North U.S. #1  Fort Pierce, FL 34950</p> <p><b>MAIL TO:</b>  City of Fort Pierce Procurement Dept.  P.O. Box 1480  Fort Pierce, FL 34954-1480</p>	<p><b>REQUEST  FOR  PROPOSALS  and  PROPOSER  ACKNOWLEDGMENT</b></p>
<p>Contact: Gelencia Carter, 772-467-3748</p>	<p>RFP No: 2016-012</p>
<p>Mandatory Pre-Bid Conference Date:  N/A</p>	<p>RFP Title: REAL ESTATE  BROKER SERVICES</p>
<p>Mandatory Pre-Bid Location:  N/A</p>	<p>RFP Opening Location:  City of Ft. Pierce Procurement Dept.  100 North U.S. #1, 1st Floor  Ft. Pierce, Florida 34950</p>
<p>RFP Due Date &amp; Time:  3:00 PM, TUESDAY, JANUARY 12, 2016</p>	<p>If you need any reasonable accommodation for any type of disability in order to participate in this procurement, please contact this department as soon as possible.</p>
<p>Proposer Name: <b>Safe Harbor Realty of Port St. Lucie, LLC / DBA Keller Williams Realty / KW Commercial Realty</b></p> <p>Mailing Address:  9700 Reserve Blvd  PGA Village</p>	<p><i>I hereby certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this proposal for the proposer.</i></p> <p>X   Authorized Signature (Manual)</p>
<p>City, State, Zip Code:  Port St. Lucie, FL 34986</p>	<p>Typed or Printed Name:  Edward A. Brzuskiwicz</p>
<p>Type of Entity (Circle One):  <input checked="" type="radio"/> Corporation <input type="radio"/> Partnership <input type="radio"/> Proprietorship</p>	<p>Title: Broker Associate / Project Leader</p>
<p>Incorporated in the State of: Florida Year: 2013</p>	<p>Delivery in _____ days, ARO</p>
<p>Phone Number: 772-236-5700 Ext 340</p>	<p>Payment Terms: Net 30 Days</p>
<p>Fax Number: 772-236-5701</p>	<p>FEIN or SS Number: 45-4474562</p>
<p>E-Mail Address: Ed.B@KW.com</p>	<p>Local Business: <input checked="" type="checkbox"/> Y <input type="checkbox"/> N MWBE: <input type="checkbox"/> Y <input checked="" type="checkbox"/> N</p>
<p>Bid Security is attached, when required, in the amount of \$ <u>N/A</u>  F.O.B. DESTINATION</p>	<p>If returning as a "No Bid" state reason: <b>"No Bid" to this RFP,</b> However our RFP 2015-051 offer will be extended for 60 days from today. See Attached Documentation</p>
<p><b>THIS PAGE MUST BE COMPLETED AND RETURNED WITH YOUR BID</b></p>	

January 11,2016

City of Fort Pierce Purchasing Depart & Mayor and City Council

100 North U.S. #1

Fort Pierce, FL 34950

RE: New Request Bid for Real Estate Broker Services RFP-2016-012

To the City of Fort Pierce Procurement Department, Mayor and City Council,

This letter is in response to the Newest Bid Request for Real Estate Broker Services RFP-2016-012. After completing the bid process for the original bid for Realtor Services RFP # 2015-051 requested by the City of Fort Pierce, and being vetted , scoring the highest rating of 933 by the City of Fort Pierce, CRA and Procurement Department, now raises serious concerns' regarding the City of Fort Pierce process of selecting a vendor to provide Real Estate Broker Services.

We had invested a great deal of time, talent and expense during the past 5 months for the City of Fort Pierce, completing the bid package correctly, then meeting with the Community Redevelopment Agency Advisory Committee completing the Presentation and Interviews on October 21,2015. After being evaluated and vetted by the CRA and City of Fort Pierce Purchasing depart, judged that our company Safe Harbor Realty LLC, DBA as Keller Williams Realty / KW Commercial was the highest scoring bidder and recommended by staff, to be awarded the contract for Realtor Services .

The following are the additional reasons for the decision for No Bid Status for the RFP# 2016-012:

- Safe Harbor Realty LLC, DBA as Keller Williams Realty / KW Commercial is licensed by the State of Florida ,as Real Estate Company / Broker to Provide all Real Estate services allowed by State of Florida, Commercial, Residential, Land, Investment, Leasing Services.
- The New RFP 2016-012 requirements, gives unfair advantage to a specific bidder.
- The CRA Committee member(s) that participated in the review and interviewed bidders, may have a vested interest, and perhaps causing a conflict of interest and therefore should have recused themselves. There opinions, could be consider biased since there company is one of the bidders which could financial benefit from there undue influence.
- Keller Williams Realty / KW Commercial completed the RFP for Realtor Services correctly and fully complied.
- Coldwell Banker Paradise / Hoyt C. Murphy was allowed to make their Presentation and Interview to the CRA Committee knowing when there bid package was incomplete and should have been, Marked Non Responsive.
- Keller Williams Realty / KW Commercial completed the Presentation and Interview process for the CRA the Community Redevelopment Agency Advisory Committee present, also with other CRA members by participated by phone.
- Keller Williams Realty was the Highest Scoring Bidder for the RFP#2015-051.
- City of Fort Pierce failed to notified the bidders of their scoring results.

Continued

- The City of Fort Pierce Purchasing recommends that Keller Williams Realty be award the RFP# 2015-051.
- After reviewing the City of Fort Pierce Council meeting, minutes and video on December 7th 2015 meeting and video of the Mayor and the City Council member's responses. Concerns for Coldwell Banker Paradise/ Hoyt C. Murphy.
- City of Fort Pierce decision to circumvent, its own Purchasing Department bidding guidelines process, to allow a Coldwell Banker Paradise / Hoyt C. Murphy real estate company to get back in the bidding, by disregarding the RFP#2015-051 and ordering a new RFP# 2016-012.

These are these reasons for our "No Bid" on RFP# 2016-012; however our bid on RFP# 2015-51 will be available to the City of Fort Pierce as it stands for next 60 days from January 12, 2016. As we stated during our presentation we are willing to work with the other real estate companies, for the betterment, growth and development , to continue to make City of Fort Pierce great.

Thank you for your attention on this matter, and look forward to a response from the City of Fort Pierce.

Sincerely,



Edward A. Brzuskiwicz Broker Associate / Realtor / CIPS,TRC,SFR,PAI  
Project Leader for the City of Fort Pierce Bid RFP #2015-051

***Keller Williams Realty / KW Commercial Real Estate Port St. Lucie***

Email: Ed.B@KW.com

Email: Ed.B@KWcommercial.com

9700 Reserve Blvd—PGA Village

Saint Lucie West, FL 34986

Office: 772-236-5700 Ext 340

Direct: 772-579-9150

- ***Member of the National Association of REALTORS®,***
- ***Member of the State of Florida Realtors® Association***
- ***Member of Realtors® Association of the Palm Beaches & Saint Lucie (RAPB)***
- ***Member of Realtors® Commercial Alliance of the Realtors® Association Palm Beaches & Saint Lucie County***
- ***Member of Global Business Alliance of the Palm Beaches and Treasure Coast (CIPS &TRC)***

## Company Overview:

Keller Williams Realty, Inc. is the largest real estate franchise by agent count in the world, with approximately 700 offices and 120,000 associates in more than a dozen countries around the world. In 2015, Keller Williams was named the No. 1 training organization across all industries in the world by Training magazine. The company has grown exponentially since the opening of the first Keller Williams Realty office in 1983, and continues to cultivate an agent-centric, education-based, technology-driven culture that rewards associates as stakeholders. The company also provides specialized agents in luxury homes, commercial and farm and ranch properties. Keller Williams Realty online at ([www.kw.com](http://www.kw.com)).

## Port St. Lucie Office:

Open in 2013 we moved in to our new location in St. Lucie West in PGA Village and quickly expanded operations with an addition increasing our office to 14,000 sq. ft. with currently 189 licensed Realtors in our Port St. Lucie Market Center. Our Keller Williams franchise is owner has 5 locations on the Treasure Coast with a new expansion planned in Indian River County bring to 6 locations serving Indian River to the Palm Beaches.

## Services:

**Residential** - Listings , Purchase, New Construction, Land, Lease

**Luxury Homes & Farm Ranch Properties**

**KW Worldwide** - Global Network of Keller Williams Realty with office around the world.

**Commercial** - Nonprofit and Municipal Services , Land and Development, Industrial , Healthcare, Office, Multifamily, Hospitality

**KW Commercial**, the commercial real estate arm of Keller Williams Realty, the largest real estate company in North America, is no stranger to success. Our commercial team consists of the most knowledgeable, results-driven brokers backed by the most innovative and scalable technology the commercial real estate industry has to offer. Our KW Commercial agents and brokers are held to the highest standard of business to exceed our clients' needs in virtually any market nationwide.

Our experts are plugged into the latest national and international markets. We achieve real estate superiority and excellence for our client base by providing an unsurpassed combination of expertise, experience, talent and resources. As a result, KW Commercial's specialists provide best-in-class service to all of our clients.

## EVALUATION COMMITTEE RANKING - RFP 2015-051, REALTOR SERVICES

Kenneth A. Durham Realty, LLC

As of 11/20/15

RANKING CRITERIA	POINTS POSSIBLE	EVALUATION COMMITTEE RANKINGS								POINTS RECEIVED	POINTS AVERAGED
		A	B	C	D	E	F	G	H		
Ability to meet/exceed the Scope of Services	30	20	20	10	15	30	20	20	15	150	21.4
Credentials and related experience	25	20	10	10	20	25	15	25	10	135	19.3
Compliance with Contract Terms and Conditions	10	10	8	10	10	10	10	10	0	68	9.7
Availability and capability for timely response	15	10	10	8	15	15	15	15	7	95	13.6
Cost of Service	20	15	20	20	20	20	20	10	18	143	20.4
Locality Rating (as per table)	0 - 25	25	25	25	25	25	25	25	20	195	27.9
<b>TOTALS</b>	<b>125</b>	<b>100</b>	<b>93</b>	<b>83</b>	<b>105</b>	<b>125</b>	<b>105</b>	<b>105</b>	<b>70</b>	<b>786</b>	<b>112.3</b>

Keller Williams Realty

RANKING CRITERIA	POINTS POSSIBLE	EVALUATION COMMITTEE RANKINGS								POINTS RECEIVED	POINTS AVERAGED
		A	B	C	D	E	F	G	H		
Ability to meet/exceed the Scope of Services	30	20	30	30	30	25	30	30	30	225	32.1
Credentials and related experience	25	25	25	25	25	25	25	25	25	200	28.6
Compliance with Contract Terms and Conditions	10	10	10	10	10	10	10	10	10	80	11.4
Availability and capability for timely response	15	15	15	15	15	10	15	15	15	115	16.4
Cost of Service	20	15	20	20	20	20	20	20	18	153	21.9
Locality Rating (as per table)	0 - 25	15	20	25	20	15	25	20	20	160	22.9
<b>TOTALS</b>	<b>125</b>	<b>100</b>	<b>120</b>	<b>125</b>	<b>120</b>	<b>105</b>	<b>125</b>	<b>120</b>	<b>118</b>	<b>933</b>	<b>133.3</b>

Coldwell Banker Paradise / Hoyt Murphy Realtors (Disqualified)

RANKING CRITERIA	POINTS POSSIBLE	EVALUATION COMMITTEE RANKINGS								POINTS RECEIVED	POINTS AVERAGED
		A	30	C	D	E	F	G	H		
Ability to meet/exceed the Scope of Services	30	20	30	30	30	30	0	30	0	170	24.3
Credentials and related experience	25	25	20	25	25	25	0	25	0	145	20.7
Compliance with Contract Terms and Conditions	10	5	10	10	5	10	0	0	0	40	5.7
Availability and capability for timely response	15	15	15	15	15	15	0	0	0	75	10.7
Cost of Service	20	0	0	20	20	0	0	10	0	50	7.1
Locality Rating (as per table)	0 - 25	25	25	25	25	25	0	25	0	150	21.4
<b>TOTALS</b>	<b>125</b>	<b>90</b>	<b>100</b>	<b>125</b>	<b>120</b>	<b>105</b>	<b>0</b>	<b>90</b>	<b>0</b>	<b>630</b>	<b>90.0</b>

## City Commission Regular Meeting

Agenda Item # 9. f.

## Meeting

Date: 12/07/2015

Re: Approval to Award RFP No. 2015-051, Realtor Services to Highest Ranked Respondent

Submitted For: Nick Mimms, Interim City Manager, City Manager

## SUBJECT:

Approval to award RFP No. 2015-051 for Realtor Services to the highest ranked respondent.

## SUMMARY:

The intent of this Request for Proposal is to obtain a licensed Florida Real Estate Broker to provide realtor services for the City of Fort Pierce. A Broker is needed to assist in the sale of surplus property within the City. It is the City's intent to award Agreements to up to three (3) brokers.

The CRA Advisory Committee has evaluated the proposals and Keller Williams Realty was deemed to be the highest ranked respondent.

## RECOMMENDATION:

Staff recommends approval of Keller Williams Realty as the highest ranked respondent.

## ALTERNATIVES:

Approval to award bid to second highest ranked respondent or to have new RFP issued.

## RESPONSIBLE STAFF:

Rebecca Grohall, Planning Manager

## COORDINATED WITH:

Nicholas C. Mimms, P.E., Interim City Manager  
CRA Advisory Committee

## Fiscal Impact

Budgeted Y/N: N

Fiscal Year: 2016

Account: NA

Amount: NA

## FISCAL IMPACT:

No fiscal impact at this time.

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## Attachments

Tabulation Sheet

RFP No. 2015-051, Realtor Services Addendum No. 1 - Revised

Rejection of Bid Letter

Evaluation Committee Ranking for RFP No. 2015-051

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## Form Review

Inbox	Reviewed By	Date
City Manager	Jennifer Robinson	11/24/2015 05:17 PM
Purchasing	Tony Barnes	12/02/2015 10:24 AM
Finance Department	Johnna Morris	12/02/2015 11:28 AM
City Manager	Nick Mimms	12/02/2015 04:44 PM
Form Started By: Jennifer Robinson		Started On: 11/24/2015 05:05 PM
Final Approval Date: 12/02/2015		

# CITY OF FORT PIERCE *Florida*



**PURCHASING DEPARTMENT  
CITY HALL, 100 NORTH U.S. 1  
P.O. BOX 1480  
FORT PIERCE, FLORIDA 34954-1480**

**TEL.: (772) 467-3000  
FAX: (772) 467-3848  
[www.cityoffortpierce.com](http://www.cityoffortpierce.com)**

October 14, 2015

**Coldwell Banker Paradise**  
411 North U.S. Highway 1  
Fort Pierce, FL 34950  
Attn: Hampton Jackson, Sales Associate

**RE: Rejection of Proposal**

Dear Mr. Jackson:

I regret to inform that your proposal, RFP No. 2015-051 ~ Realtor Services, has been rejected due to failure of adhering to the guidelines listed in the proposal document, Section 5.0 Proposal Submission Format. Purchasing Staff was notified by a member of the Evaluation Committee that your submission was missing, the "Cost of Service", after a certified letter was mailed inviting you to participate in the next phase, Presentation/Interview, on October 21, 2015 which now has been withdrawn. Your submission was reviewed by Purchasing Staff to authenticate the claim made by the committee member, and it has been determined that Section 5.7 – Cost of Service was not included with your submission.

If you have any questions please feel free to call me at (772) 467-3749, or email me at [gcarter@city-ftpierce.com](mailto:gcarter@city-ftpierce.com).

We appreciate your interest in doing business with the City of Fort Pierce and we certainly hope you will continue to have an interest in future projects.

Sincerely,  
**CITY OF FORT PIERCE**

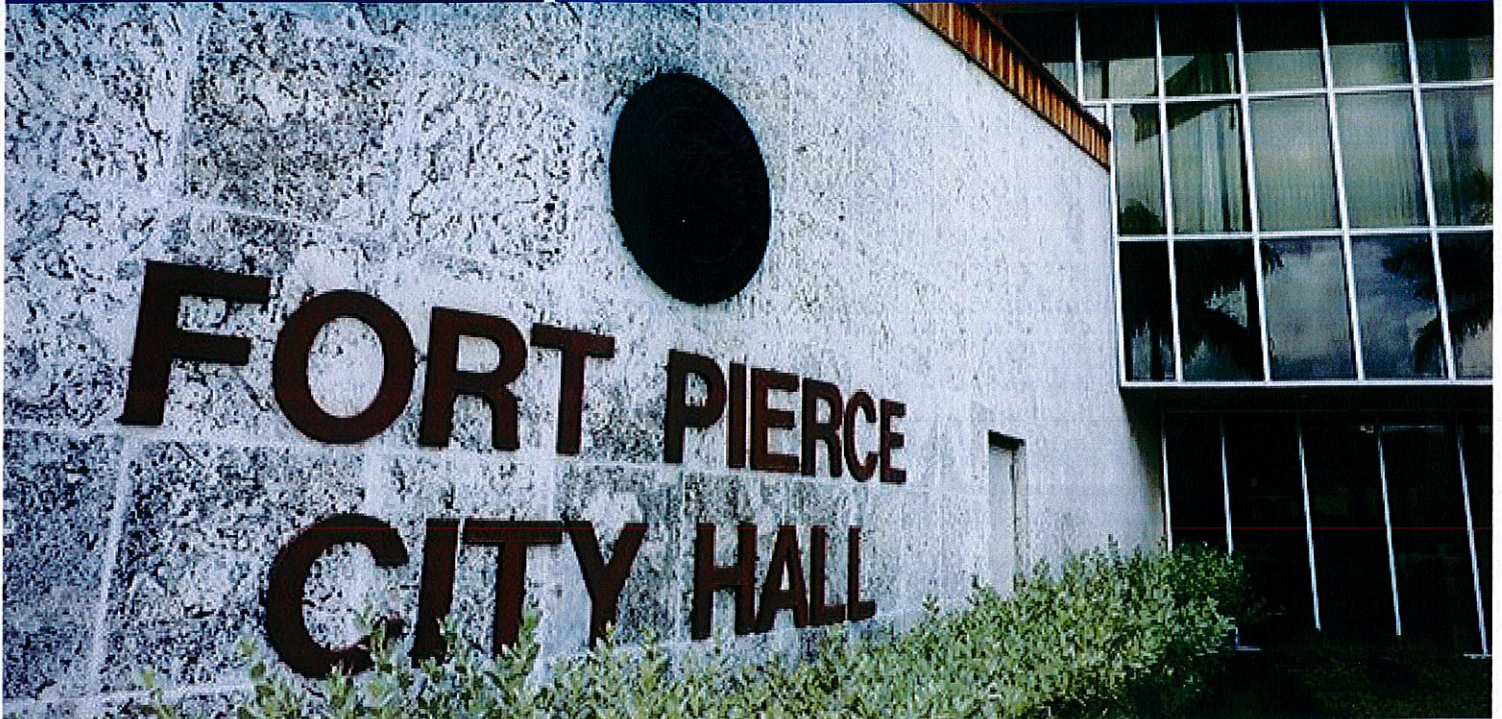
Gelencia Carter, MPA  
Purchasing Manager

/gc

cc: Nick Mimms, Deputy City Manager  
Tony Barnes, Director of Administrative Services  
Angela Wilkinson, Executive Assistant  
File



PARADISE HOYT MURPHY REALTORS



## CITY OF FT. PIERCE BID PROPOSAL

RFP No. 2016-012

**PREPARED FOR:**

**Gelencia Carter**  
City of Ft. Pierce  
Purchasing Department


**PREPARED BY:**

**Coldwell Banker Commercial**  
Coldwell Banker Paradise Hoyt Murphy Realtors

**Hampton Jackson**  
(772) 494-8402  
Hampton.Jackson@ColdwellBanker.com

**Hoyt C. Murphy, Jr.**  
(772) 971-7424  
Hoyt.MurphyJr@ColdwellBanker.com

411 North US 1 Highway 1, Ft. Pierce, FL 34950  
Ph: (772) 461-3250/Fx: (772) 460-2067

<p><b>DELIVER TO:</b>  City of Fort Pierce  100 North U.S. #1  Fort Pierce, FL 34950</p> <p><b>MAIL TO:</b>  City of Fort Pierce Procurement Dept.  P.O. Box 1480  Fort Pierce, FL 34954-1480</p>	<p><b>REQUEST  FOR  PROPOSALS  and  PROPOSER  ACKNOWLEDGMENT</b></p>
<p><b>Contact: Gelencia Carter, 772-467-3748</b></p>	<p><b>RFP No: 2016-012</b></p>
<p><b>Mandatory Pre-Bid Conference Date:</b>  N/A</p>	<p><b>RFP Title: REAL ESTATE  BROKER SERVICES</b></p>
<p><b>Mandatory Pre-Bid Location:</b>  N/A</p>	<p><b>RFP Opening Location:</b>  City of Ft. Pierce Procurement Dept.  100 North U.S. #1, 1st Floor  Ft. Pierce, Florida 34950</p>
<p><b>RFP Due Date &amp; Time:</b>  3:00 PM, TUESDAY, JANUARY 12, 2016</p>	<p>If you need any reasonable accommodation for any type of disability in order to participate in this procurement, please contact this department as soon as possible.</p>
<p><b>Proposer Name:</b>  Coldwell Banker Paradise.....</p> <p><b>Mailing Address:</b>  411 North US 1.....  .....  .....</p>	<p><i>I hereby certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this proposal for the proposer.</i></p> <p>X   Authorized Signature (Manual) <i>Proven</i></p>
<p><b>City, State, Zip Code:</b>  Fort Pierce, FL, 34950</p>	<p><b>Typed or Printed Name:</b>  Hampton Jackson</p>
<p><b>Type of Entity (Circle One):</b>  Corporation Partnership Proprietorship</p>	<p><b>Title:</b>  Sales Associate</p>
<p><b>Incorporated in the State of:</b> Florida Year: 1953</p>	<p><b>Delivery in _____ days, ARO</b></p>
<p><b>Phone Number:</b> (772) 461-3250</p>	<p><b>Payment Terms:</b> Net 30 Days</p>
<p><b>Fax Number:</b> (772) 460-2067</p>	<p><b>FEIN or SS Number:</b> 65-0939709</p>
<p><b>E-Mail Address:</b> hampton.jackson@coldwellbanker.com</p>	<p><b>Local Business:</b> <input checked="" type="checkbox"/> Y <input type="checkbox"/> N <b>MWBE:</b> <input type="checkbox"/> Y <input checked="" type="checkbox"/> N</p>
<p><b>Bid Security is attached, when required, in the amount of \$ _____ N/A</b>  <b>F.O.B. DESTINATION</b></p>	<p><b>If returning as a "No Bid" state reason:</b></p>
<p><b>THIS PAGE MUST BE COMPLETED AND RETURNED WITH YOUR BID</b></p>	



**BID PROPOSAL RFP NO. 2016-012**

**LETTER OF TRANSMITTAL**

January 11, 2016

City of Ft. Pierce - Purchasing Department  
100 North U.S. #1  
Ft. Pierce, Florida 34950

RE: Bid RFP No: 2016-012

Dear Procurement Dept.:

Thank you for the opportunity to conduct business with the City of Ft. Pierce. Here at Coldwell Banker Paradise Hoyt Murphy REALTORS® we are pleased to submit our proposal to represent the City of Ft. Pierce as your Exclusive Brokerage Firm. Our organization has been serving the needs of the Treasure Coast for over 60 years. We are one of the largest brokerage firms on the Space and Treasure Coast. When it comes to your day to day residential and commercial needs, we are the dominant name in the real estate industry, boasting a large global footprint and the greatest concentration of experienced talent.

Sincerely,

A handwritten signature in black ink that reads 'Hampton Jackson'.

Hampton Jackson, REALTOR



**PROPOSER'S QUESTIONNAIRE**  
**RFP #2016-012**  
Real Estate Broker Services

It is understood and agreed that the following information is to be used by the City of Fort Pierce to determine the qualifications of Proposers to perform the work required. The Proposer waives any claim against the City that might arise with respect to any decision concerning the qualifications of the Proposer.

The undersigned attests to the truth and accuracy of all statements made on this questionnaire. Also, the undersigned hereby authorizes any public official, person, firm or corporation to furnish the City of Fort Pierce any pertinent information requested by the City deemed necessary to vary the information on this questionnaire.

Dated this 11th day of January, 2016.

Coldwell Banker Paradise Hoyt Murphy Realtors/ Hampton Jackson

Name of Organization / Proposer

By: Hampton Jackson/ Sales Associate

Name and Title

(If more space is needed, please attach additional sheets.)

1. Corporation, Partnership, Joint Venture, Individual or other?  
Corporation

2. Firm's name and main office address, telephone and fax number, e-mail:

Coldwell Banker Paradise Hoyt Murphy Realtors

411 North US 1

Fort Pierce, FL, 34950

(P); (772)461-3250; (F); (772)460-2067; hampton.jackson@coldwellbanker.com

3. Give the names of the person who will be authorized to make decisions and speak as a representative of the Proposer, their titles, addresses and telephone and facsimile numbers.

Hampton Jackson/Sales Associate & Hoyt C Murphy Jr./Broker Associate

411 North US 1

Fort Pierce, FL, 34950; (P); (772)461-3250; (F); (772)460-2067

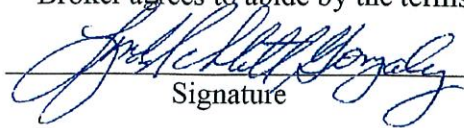
4. Firm's previous names (if any).

Hoyt C Murphy Inc. Realtors



17. Is your firm a member of Multiple Listing Service (MLS)? See Attached

18. Broker agrees to abide by the terms and conditions of the City Contract.

  
Signature \_\_\_\_\_ Broker \_\_\_\_\_ Title \_\_\_\_\_

19. ADDENDUM ACKNOWLEDGMENT - Proposer acknowledges that the following addenda have been received and are included in his/her proposal:

Addendum Number	Date Issued
RFP No. 2016 -012 No. 1	January 5, 2016
RFP No. 2016 -012 No. 2	January 5, 2016

20. Please enter below the percentage of the NET value (after all expenses) of the lease or sale that your firm will charge for the services that you will be providing. The City will not enter into an open-ended contract. This would be a one-time fee percentage of the new value of the lease or value of the net sale to the City.

Service	Fee
Sale	<u>See Attached</u> % Net value
Lease	<u>See Attached</u> % Net Value

Additional Services	Rate
<u>See Attached</u>	<u>See Attached</u>
<u>See Attached</u>	<u>See Attached</u>

**This is a word document as lines as needed.**



**QUESTIONNAIRE - #7**

DATE	LOCATION	NAME	DESCRIPTION	VALUE
<b>Partial List of PRE 2000 Sales</b>				
<b>1992</b>	Old Dixie Highway	FDIC	74 Acre River Front	\$450,000.00
	Okeechobee Road	Seminole Tribe	54 Acres	\$500,000.00
	Kings Highway	Treasure Coast Realty	40 Acre Industrial Site	\$432,500.00
	A-1-A, Martin County	RTC	Oceanfront Site	\$600,000.00
<b>1993</b>	St. Lucie West	Marriot	Distribution Center	\$3,400,000.00
	2050 South U.S. #1	Checkers	Fast Food Site	\$330,000.00
	Boca Raton		Strip Center	\$1,025,000.00
	Oslo Rd., Vero	Treasure Coast Refuge	Industrial Facility	\$500,000.00
<b>1994</b>	North U.S. #1	North Bridge Plaza	Retail Building	\$650,000.00
	St. Lucie County	Areo Acres	SD Liquid.	\$345,950.00
	St. James Blvd.		School Site	\$432,600.00
	200 Indian River Drive	Ft. Pierce Hotel	Downtown Rental	\$525,000.00
<b>1995</b>	907 Weatherbee Road		12 Apts.	\$320,000.00
	Stuart	FDIC	14 Condos	\$572,000.00
	St. Lucie West		Ind. Site	\$239,900.00
	3051 Industrial 25th St.		Ind. Bldg.	\$325,000.00
<b>1996</b>	1811 South U.S. #1	First Union Bank	Auto Dealer	\$350,000.00
	Belize Central America		2500 Acres	\$550,000.00
	1610 North 25th Street		14 Unit Apt.	\$260,000.00
	N. Hutchinson Island	Wynne Development	High-rise Site	\$977,500.00
<b>1997</b>	Orange Avenue Ext.	Surloff Ranch	54 Acres	\$269,000.00
	709 South 5th Street	First Union Bank	Office Bldg.	\$450,000.00
	4201 St. Lucie Blvd.		Warehouse	\$389,000.00
	9 Fisherman's Warf	Treadco	Ind. Bldg.	\$350,000.00
<b>1998</b>	North U.S. #1	Seacoast Storage	Dev. Site	\$170,000.00
	Port St. Lucie Blvd.		Com. Site	\$185,000.00
	Reserve - PSL	Marsh Landings	10 Res. Lots	\$200,000.00
	North U.S. #1		12 Ac. Com.	\$265,000.00
<b>1999</b>	4600 North U.S. #1	Hilltop Restaurant	Dev. Site	\$275,000.00
	3409 Industrial 27th		Ind. Bldg.	\$260,000.00
	North A-1-A	Grand Rapids Fndation	High-rise Site	\$2,888,000.00
	Fort Pierce	Lawwood Place	Condo Site	\$490,000.00
<b>1999</b>	Indian River County	Egan Groves	Acre Grove Site	\$419,000.00
	South A-1-A	Wynne Development	High-rise Site	\$600,000.00
	Indrio S-1 - 95	Tranquility Plantation	Dev. Site	\$575,000.00
	Carlton Road	Teaque Ranch	320 Acres	\$583,000.00
<b>1999</b>	Indrio Road	Discount Auto Parts	Com. Site	\$796,300.00
	Vero Beach	First National Bank	Rental Apts.	\$245,000.00
	907 South 3rd Street	Suntrust	Warehouse Bldg	\$270,000.00
	2491 Keen Road		ALF Facility	\$144,500.00
<b>1999</b>	Jenkins Road	St. Peter's Lutheran	Church Site	\$290,000.00
	Kings Hwy Ind. Park	Bee Electronics	Ind. Site	\$225,000.00
	South U.S. #1	Grand Savanna Club	320 Unit Apt.	\$910,000.00
	3054 Industrial 33rd.		Ind. Bldg.	\$198,000.00
<b>1999</b>	1301 South U.S. #1	Clock Restaurant	Rest. Bldg.	\$235,000.00
	Okeechobee, FL	Boswell Grove / Ranch	448 Acres	\$735,713.00
	1102 South U.S. #1		Com. Bldg.	\$300,000.00
	Seminole Road	Speed Grove	93 Acres	\$462,135.00
<b>1999</b>	South A-1-A	S. Florida Water Mgt.	103 Ac. Ocean	\$4,590,000.00
	100 Avenue "A"	P.P. Cobb Complex	Com. Bldg.	\$775,000.00
	200 Indian River Drive	Manatiki Restaurant	Rest. Bldg.	\$360,000.00
	Wheeler Terrace	Sleep Inn	Hotel Site	\$290,000.00
<b>1999</b>	South U.S. #1	Wendy's	Restaurant Site	\$337,500.00
	Fort Pierce		12 Rental Units	\$230,000.00
	St. Lucie County		20 Rental Units	\$485,000.00
	Rangeline Road	Fox TV	Heavy Ind. Site	\$148,500.00
<b>1999</b>	South 25th Street	St. Lucie County	13 Ac. Pres.	\$210,000.00
	Fort Pierce		12 Rental Units	\$178,000.00
	South U.S. #1	Sunrise Ford	Dealership Exp.	\$597,500.00
	N. Hutchinson Island		High-rise Site	\$1,200,000.00



**QUESTIONNAIRE - #7**

	900 Virginia Avenue		Office Complex	\$890,000.00
	2012 South U.S. #1	Citgo Oil	Major Oil Site	\$740,000.00
	Seminole Road		228 Ac. Grove	\$581,000.00
	901 North 7th Street	Don King Enterprises	Boxing Camp	\$867,000.00
	Okeechobee At I-95	Harbor Federal	10.9 Ac. Com.	\$265,500.00
	St. Lucie Cross Roads	Harbor Federal	3 Com. Lots	\$217,000.00
	Darter Court	Steak-N-Shake	Fast Food Site	\$497,000.00
	Vero Beach	Montoya Groves	104 Acres	\$600,000.00
	St. Lucie Blvd.		71 Ac. Ind.	\$425,000.00
	Vero Beach	Smigel Partners	Acre Grove	\$814,810.00
<b>2000 Sales</b>				
Jan-00	Peters Road I-95	Orange Public Storage	Mini-Storage Site	\$200,000.00
Mar-00	I-95, Orange Avenue	WCI	324 Acre Site	\$2,400,000.00
Apr-00	North A-1-A	TRIZEK Development	High-rise Site	\$1,550,000.00
	Kings Hwy Ind. Park	ATX Forms	Ind. Site	\$126,000.00
	5350 Sun Citrus Blvd.	Bank of America	Ind. Bldg.	\$600,000.00
May-00	South U.S. #1	Olson	Com. Site	\$370,000.00
	Kit Industrial Park	AAA Copper	Industrial Site	\$263,200.00
Jun-00	3505 Kirby Loop Road	Moose Lodge	Fellowship Lodge	\$325,000.00
Jul-00	North A-1-A	SFWM	60 Ac. Ocean Pres.	\$700,000.00
Aug-00	6190 Emerson Avenue		Plant Nurs. & Hm	\$45,000.00
	3865 North U.S. #1		Island Triplex	\$204,000.00
Sep-00	South A-1-A	Crimson Group	850 Ft. Oceanfront	\$950,000.00
Oct-00	Rangeline Road	McCarthy	125 Acres - AG	\$375,000.00
Nov-00	Vero Beach	Mason Simpson	Oceanfront Dev.	\$4,700,000.00
Dec-00	801 Avenue "B"		Rental Units	\$204,000.00
	Old FFA Road	Horizon Tree Farm	AG Site	\$270,000.00
<b>2001 Sales</b>				
Jan-01	2701 Industrial 3rd.	Modular Medical	Ind. Bldg.	\$350,000.00
	North A-1-A	AYERS Group	Oceanfront Site	\$989,000.00
Feb-01	800 South 3rd St.	Lloyd Properties	Com. Site	\$111,000.00
	Indian River Drive	Adams Ranch	Riverview Com.	\$362,000.00
Mar-01	617 Orange Avenue		Com. Bldg.	\$150,000.00
	Okeechobee		105 Acre Ranch	\$430,000.00
	415 Avenue "A"	Brackett Family	Office Bldg.	\$395,000.00
May-01	Vero Beach		Dev. Site	\$298,200.00
Aug-01	1802 South U.S. #1	Sunset Inn	Motel	\$900,000.00
	Vero Beach		20 Acre - AG	\$217,000.00
Sep-01	3322 Orange Avenue		Com. Bldg.	\$200,000.00
	Shinn Road	Rovi Farms	Tree nursery Site	\$330,000.00
Oct-01	North A-1-A	KODSI Developers	High-rise Site	\$865,000.00
	Fort Pierce		22 Rental Units	\$415,000.00
	Hutchinson Island		Dev. Site	\$2,100,000.00
	1025 Orange Avenue	Brackett Family	Redev. Site	\$335,000.00
	2501 Virginia Avenue		Bank Site	\$305,000.00
Nov-01	Will Fee Road		Industrial Site	\$135,000.00
Dec-01	St. Lucie County	Equitable Life	1135 Ac. AG	\$2,100,000.00
	St. Lucie County	Metropolitan Life	164 Ac. AG	\$410,000.00
	Okeechobee Road	Prudential Insurance	327 Dev. Site	\$2,200,000.00
<b>2002 Sales</b>				
Feb-02	Fort Pierce		8 Rental Units	\$190,000.00
	Okeechobee & Carlton		22 Ac. AG	\$148,000.00
Mar-02	Kings Hwy Ind. Park		Industrial Site	\$115,000.00
	Vero Beach	Vero Airport Trade Cntr	Com./Ind.	\$1,350,000.00
	905 Avenue "J"		9 Unit Apt.	\$240,000.00
	Johnson Road	Kingwood Estates	107 Ac. Dev.	\$668,250.00
Apr-02	614 Avenue "I"		6 Unit Apt. Bldg.	\$145,000.00
	4002 North A-1-A		Oceanfront Site	\$435,000.00
	10072 N. Ocean Blvd.	Beach Company	High-rise Site	\$2,100,000.00
May-02	3215 South U.S. #1	WBS Management	Retail Center	\$700,000.00
	3501 Orange Avenue	WBS Management	Office Building	\$325,000.00



**QUESTIONNAIRE - #7**

	4891 North U.S. #1	Hopkins	Motel Rehab	\$225,000.00
Jun-02	St. Lucie Crossroads	Zurich Investors	Commercial Sites	\$349,000.00
	Carlton Road	Bailey Ranch	110 Acres	\$546,000.00
Jul-02	2635 Keen Road		20 Acre Ranchette	\$230,000.00
	Orange & Pulitzer		37 Acre Grove	\$210,000.00
	South 25th Street	Rosslow & Radke	8 Ac. Dev. Site	\$135,000.00
	Dundas Court		6 Rental Units	\$90,000.00
Aug-02	Fort Pierce		14 Rental Units	\$320,000.00
Sep-01	North A-1-A	Suntrust Bank	12 Acres W/Side	\$400,000.00
	North A-1-A	P.V. Martins Restaurant	Oceanfront Rest.	\$1,500,000.00
	South U.S. #1	Larter Family	8 Acres Commercial	\$490,000.00
	Kings Highway	Trenay	34 Acre Site	\$335,000.00
	Orange Avenue	Twin Oil	Oil Station AMCO	\$475,000.00
	Louisanna Avenue		24 Unit Apt.	\$905,000.00
Oct-01	8 a. grove Brocksmith	DiGuseppi	28 Acre Grove	\$150,000.00
	3415 Midway Rd.	FL Center for Recovery	ALF/ Rehab Center	\$4,210,000.00
Nov-01	Ind. Lots for Schwan's	Schwan's Famly	2 Industrial Lots	\$81,000.00
	Emerson Road	Berman Trust	80 Acres	\$703,000.00
	5443 N. US1 Com Site	Prichard	Commercial Site	\$213,000.00
Dec-01	800 Virginia Ave	H & H LLC	Retail Plaza	\$2,800,000.00
	Sunrise & Bell Avenue	Gevinson ET AL	21 Ac. Multi-fam.	\$215,000.00
	920 Midway Road	Bailey Family	38 rental units	\$1,450,000.00
	Reserve Bus. Park	Adam's Ranch	Warehouse Building	\$1,250,000.00
	1150 Bell Ave.	Taylor Investments	Warehouse Building	\$700,000.00
	Johnston Road	Maimon Properties	37 Ac. Dev. Park	\$440,000.00
<b>2003 Sales</b>				
Jan-03	North 25th Street	Holtsberg	Unit Apartment Site	\$125,000.00
	Orange & Sneed	Diamond R Fertilizer	37 Acre Industrial Site	\$250,000.00
	Kings Highway	Trenay Properties	34 Acre Industrial Site	\$532,115.00
	82 Ave Vero Beach	Equitable Life	100n Ac. Investment	\$5,250,000.00
	North 29th Street	Johnson Family	9 Rental Apartments	
	North U.S. #1	Bank	Orchid Acres MH Park	\$440,000.00
	701 South U.S. #1	Holmes Oil	CitGo Gas Station	\$350,000.00
Feb-03	U.S. #1 & Indrio Road	Murphy / Witt	Intersection Site	\$385,000.00
	Johnston Road	Stephens Citrus	35 Acre Grove	\$342,500.00
	3490 Oleander Avenue	Nelson	Warehouse Building	\$350,000.00
	Angle Road	Leal Investment	280 Ac. Dev.	\$2,000,000.00
	KH Industrial Park	BUEROGGE	2 Industrial Lots	\$131,700.00
	1360 Carlton Court	Bodhoo Investments	5 Units, S. Beach	\$300,000.00
	493 Port St. Lucie Blvd.	Riverside / Krozz	Commercial Site	\$425,000.00
Mar-03	2696 McNeil Road	Acadmy of Sports	3 Acres McNeil Road	\$110,000.00
	400 North Rock Road	Mid FL Freezer	10 Acre Industrial Site	\$535,000.00
	Juanita Avenue	St. Lucie County	56 Acre Preservation	\$744,000.00
	1800 North U.S. #1	Hurst / Bank of America	Warehouse Building	\$175,000.00
	Cove Road	Solitron Building	20 Acre Site	\$800,000.00
Apr-03	KH Industrial Park	Steiner	6 Industrial Lots	\$408,500.00
	414 Avenue A	Brackett Family	800 sf downtown bldg	\$315,000.00
May-03	Germany Canal Road	Mallard Trust	318 Acre Grove	\$713,250.00
	Kings Highway	Wynne Corp.	58 Ac. Dev.	\$700,000.00
	614 Avenue I	Lancaste	6 Unit Apt. Bldg.	\$195,000.00
	Sapp Road	Forte / MMG Holding	Light Industrial	\$160,000.00
	2650 Peters Road	Orange Storage	8 Ac. Com. Site	\$380,000.00
Jun-03	9500 South U.S. #1	AIG Insurance Group	K-Mart Bldg.	\$1,200,000.00
	604-610 Ixoria Avenue	Freeman Receiver	32 Comdominiums	\$1,584,000.00
	U.S. #1 & Tozour	Zoratti	1.3 Ac. Com. Site	\$102,500.00
	St. James Drive		9.6 Acre	\$325,000.00
	Glades Cut Off Road	Walmart / Flagler	228 Acre Distribution	\$5,595,000.00
	South 25th Street	Terpening / Wild	63 Ac. Dev. Site	\$1,900,000.00
	Port St. Lucie Blvd.	Riverside Bank	1 Acre Site	\$425,000.00
	A-1-A	Lancaster	Oceanfront Duplex lot	\$445,000.00
Jul-03	Seaway Drive	Rollins Family	Development Site	\$525,000.00
	Virgina Avenue	Joseph Metler ET AL	Professional Site	\$205,000.00
	U.S. #1	First Republic Co.	8 Ac. Ind. Dev.	\$263,000.00



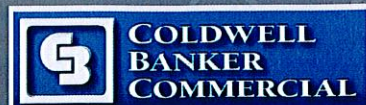
**QUESTIONNAIRE - #7**

Jul-16	Seaway Drive	Rollins Family	Inlet Front	\$525,000.00
Aug-03	North A1A	Doverspike	210' Oceanfront	\$1,117,000.00
	Kobleguard	Schirard Family	36.5 Ac. Future Dev.	\$457,280.00
	Lakewood Park	Stephens Rental	37 Rental Units	\$1,500,000.00
	602 South 10th Sreet	Nishcra LLC	Rental Units	\$350,000.00
	Selvitz	Gottlieb	Selvitz Rd.	\$200,000.00
Sep-03	805 Shorewinds	Kolano	N. Beach Triplex	\$245,000.00
	2900 Industrial 33rd	Trim Craft Industrial	5 Acre Industrial Site	\$280,000.00
	1001 S. Ocean Drive	KODSI Development	S. Beach Condo Site	\$2,325,000.00
	South U.S. #1	ARRP TRUST	Commercial Site	\$335,000.00
Oct-03	1404 S. 28th St.	KNAPP Investment	Office Building	\$290,000.00
	Orange Avenue Exit	Marine Investments	3 Acre Citrus Grove	\$299,000.00
	Copenhaver Road	Neil / Griffin	34 Acre I-95 Site	\$1,750,000.00
	Seaway Drive	MMG Partners	Inlet Front Site	\$900,000.00
Nov-03	Orange Ave. & I-95	Pugliese Investment	13 Acre I-95 Site	\$895,000.00
	3955 S. US Hwy #1	ARRP	13 Acre Com. Site	\$475,000.00
	90th Ave. - Vero	Barone Family	Citrus Grove	\$643,750.00
	74th Ave. - Vero	Kennedy Grove	Citrus Grove	\$250,500.00
	3955 S. U.S. Hwy #1	ARRP Trust	Mixed Use Site	\$475,000.00
	North 29th Street	Hunt Family	17 acre multi-family site	\$540,000.00
Dec-03	Schumann Road	Etter Family	43.8 acre Grove	\$344,000.00
	Kings Highway	Etayem Family	19.5 Development Site	\$410,000.00
	1803 South 25th	Summerhays Ptnership	Prof. Office Bldg.	\$890,000.00
	Carlton Road	Varn Citrus	70 acre citrus grove	\$350,000.00
	Rouse Road	Acorn R.E.	Riverfront M.H. Park	\$2,300,000.00
	607 S. Market Rd.	Casey Group	Warehouse Complex	\$625,000.00
	540 S. Market Rd.	Levine Investments	1 Ac. Ind. Site w/imp.	\$1,600,000.00
	Carlton Road	Varn Citrus	69 acre Grove	\$350,000.00
<b>2004 Sales</b>				
Jan-04	Angle Road	Rubio Partners	154 Acres	\$1,558,834.00
	919 South 25th	Former ABC MH Park	Apt. Dev. Site	\$452,000.00
	6000 S. US. Hwy #1	Keeting Partners	5 acres commercial	\$610,000.00
	Range Line Road	Design Built, Inc.	10 acres Industrial	\$325,000.00
	Sunrise Boulevard	Sandpiper Group	20 Ac. Dev. Site	\$295,000.00
	17 & 43 Ave. Vero	Sundland Development	VB Dev. Site	\$3,600,000.00
	2700 Industrial 2nd	Pugliese Family	70,00 s.f. warehouse	\$1,300,000.00
Feb-04	Indrio Road	General Electric	15 Ac. Multi-Family	\$610,000.00
	755 Midway Rd. Lot	Deulilo	Vacant Commercial Lot	\$125,000.00
	2800 Kings Highway	Pilot Truck Stop	Office building	\$325,000.00
Mar-04	25th St. SW, Vero	Sundland Development	Development Site	\$1,127,000.00
	Prima Vista Blvd. Lot	AARRP Family	Commercial Lot	\$185,000.00
	St. Lucie & Hammond	Sapp Family	2.7 acres Industrial	\$175,000.00
	U.S. Hwy. #1		Pool Business	\$115,000.00
	Avenue C	Hunt Trust	3 Acre Multi-Family Site	\$60,000.00
Apr-04	U.S. Hwy. #1		.9 acres commercial	\$225,000.00
	Emerson Avenue	Rieder Group	Future Dev. Site	\$866,020.00
	360 Carlton Ct.	Fodor Family	5 Unit Apt. S. Beach	\$355,000.00
	407 Angle Rd.	Fodor Family	Industrial Site	\$175,000.00
	14500 Okeechobee Rd	Morales	Convenience Store	\$154,500.00
	623 Texas Ct.	Bodhoo Family	3 rental units	\$80,000.00
	Emerson Ave.	Platts Family	40 acres future dev. Site	\$865,000.00
	Emerson Ave.	Platts Family	40 Ac. Future Dev.	\$865,000.00
	2010 Ave. D	New Thailand	Restaurant	\$95,000.00
	1302 N. 2nd	Alonzo	Port Area Parcel	\$195,000.00
	Goodwin Rd.	S & S. Land	Future Dev. Site	\$939,900.00
	South U.S. #1	WTC Investment	4.2 Ac. Com. Site	\$335,000.00
	620 S. U.S. #1	Lentin	Commercial Site	\$195,000.00
May-04	198 Rosewood	Trenary	Development Site	\$282,500.00
	658 N. 2nd	Smyth Family	Retail/Apt. downtown	\$250,000.00
	S. 2nd St.	Barnes Trust	Office site downtown	\$253,000.00
	2310 S. 29th	Southern Conference	Non-Profit Mtg. Hall	\$450,000.00
	Kings Highway	Builders First Source	22.9 Ac. Ind. Site	\$582,500.00
	N. U.S. #1 & Indrio	Wolf Acquisitions	13 acre corner site	\$1,500,000.00



**QUESTIONNAIRE - #7**

May-04	658 North 2nd 2310 S. 29th	Minor Woodmen of the World	Bait & Tackle Shop Com. Bldg.	\$250,000.00 \$450,000.00
Jun-04	Off Orange Ave. Ext. 3855 S. U.S. #1	Wynne Ranch Wal-Mart	Agricultural Land Sam's Club Bldg.	\$1,050,000.00 \$2,910,000.00
	Mariah Circle	Bobcat Investments	1.2 Ac. Ind. Site	\$95,000.00
	Seminole Road	Brant Jr.	Future Dev. Site	\$2,640,400.00
	Mohawk Avenue	Bailey Family	21 home sites	\$281,667.00
	South A1A Lot	Pine Tree 66 Corp.	Oceanfront Lot	\$710,000.00
Jul-04	25 acres ocean front	MMG LLC	Oceanfront Condo Site	\$5,900,000.00
	1 South U.S. Hwy #1	Nelmart Assoc.	18 Acres Commercial	\$1,700,000.00
	Smallwood Ave.	Ando Midas Family	12 Acres Multi-Family	\$450,000.00
	S. 25th St. & Midway	Zaydon Trust	28 Ac. Res. Site	\$1,650,000.00
	Orange Ave. & 11 St.	Dovespike	Commercial Lot	\$107,300.00
	Indrio Crossings Ph II	Freedman Group	14 Ac. Shopping Center Site	\$1,300,000.00
	1204 19th Place	PARVUS	Com. Bldg. Vero	\$550,000.00
	Kings Highway	Treasure Coast Realty	17 Acre Industrial Site	\$800,000.00
	Johnson Road	Horizon Investments	Dev. Site I.R. Co. Line	\$2,150,000.00
	Weatherbee Road	Kraaz Family	6.5 Ac. Dev. Site	\$400,000.00
Aug-04	Weatherbee Road	Leonard/Brinkley Family	Multi-Family Site	\$340,000.00
	St. Lucie Blvd.	Scan Print	5.5 Acre Industrial Site	\$352,550.00
	DeMaret St., Titusville	Sierra Properties	Multi-Family Site	\$340,000.00
	Carlton Road	Ginn Development	102 Ac. Future Dev.	\$1,016,900.00
	Seneca Avenue	Bailey Family	10 Duplexes	\$1,028,000.00
	North A-1-A	Vittello Investments	1.7 Ac. Multi-fam. Site	\$2,300,000.00
	1028 Orange Avenue	Snyfer Partners	Retail Strip & House	\$165,000.00
	1822 Gulfstream Ave.	Marangelli	Beach area duplex	\$320,000.00
	Weatherbee Rd. Lot	Wuehrman	Commercial Lot	\$340,000.00
	Indrio Rd.	Sussex Dev. Co.	17.5 Acre Developmental Pa	\$595,000.00
Sep-04	St. Lucie Blvd.	Katwaru Family	1.09 Acres Com. Invest.	\$110,000.00
	6000 St. Lucie Blvd.	Chua Family	24 Ac. Future Ind. Site	\$903,170.00
	Keen Road	Chua Family	16 Ac. Future Ind. Site	\$474,000.00
	823 Sunrise	Celestial Grp	19 Unit Apt. Bldg.	\$1,200,000.00
Oct-04	1940 PSL Blvd.	Mannino Family	Strip Center	\$1,500,000.00
	2635 Keen Road	Schreiber Investments	23 ac. Future Ind. Site	\$818,650.00
	Dusk Way	Platts/Rowe Family	75 Acre Grove	\$930,000.00
	S. U.S. Hwy #1	Siliquin Auto	3 Commercial Acres	\$300,000.00
	Lots A1A	S. Beach Cottage Corp	11 Commercial Lots	\$360,000.00
Nov-04	Fork Rd., Stuart	P.B. Horizons	4.3 ac. Multi-fam. Site	\$850,000.00
	North U.S. #1	Hancock Trust	Commercial Site	\$185,000.00
Dec-04	5242 St. Lucie Blvd.	Khan Family	1.8 ac. Com. Site	\$135,000.00
	Decordre Ct. & S. 17th	BiSear Investment	4 Duplexes	\$355,000.00
	North U.S. #1	Wynne/Newman	2 Ac. Com. Site	\$401,732.00
	401 Angle Road	Adams Ranch	Wholesale Sup. Fac.	\$1,275,000.00
	Nebraska Ave.	Adams Ranch	Med. Office Fac.	\$1,275,000.00
	River Ridge	Multiple Buyers	6 Condos	\$610,000.00
<b>2005 SALES</b>				
Jan-05	Header Canal	Turner Investments	225 Acre Ag Land	\$3,128,000.00
	2502 Okeechobee Rd.	Fernandez	Com. Intersection Site	\$278,000.00
	1757 Seaway Dr.	Sussex Dev.	Multi-Family Site	\$275,000.00
	Kings Hwy.	Miller Family	13.6 acres-pot. Ind. Site	\$1,073,610.00
	66th & 53rd - Vero	AYOUB Family	Development Site	\$2,050,000.00
	1940 N. 3rd	MaComber Properties	Future dev. Site	\$230,000.00
Feb-05	Hammond Rd.	Cushman Fruit Co.	38 acres ind.	\$1,110,400.00
	17th Street	Jana/Lawson	Commercial Site	\$591,000.00
	3245 Okeechobee Rd	Adams Ranch	Hughes Plmbg Facility	\$1,100,000.00
	2903 Orange Ave.	Coleman Invest.	Strip Center	\$455,000.00
	823 Orange	Theobald Brothers	Commercial Bldg.	\$550,000.00
	1009 Midway Rd.	Rising Sun Invest.	Commercial Site	\$175,000.00
	Header Canal	Hancock Family	27 Acre Grove	\$350,000.00
	Various Locations	Jazzmaz, Inc.	Various Bldg Lots	\$591,500.00
	Nebraska Ave.	Thames Family	Multi-Family Site	\$320,000.00
	Okeechobee Rd.	Forget Family	15.9 Acres Future Commerc	\$1,300,000.00
Mar-05	Indrio Rd.	Indrio Estates, Ltd.	32 acre Dev. Site	\$1,100,000.00



PARADISE HOYT MURPHY REALTORS

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**QUESTIONNAIRE - #7**

May-05	440 NW Peacock Rd.	Adams Ranch	SLW Ind. Bldg 22,000	\$2,350,000.00
	2909 S. 25th ST.	Lotux Investments	Multi-family Site	\$615,000.00
	Sapp Road	Freeman	Ind. Site near Airport	\$737,000.00
	Edwards & Selvitz	Honea Investments	Development Site	\$475,000.00
	7445 Commercial Cntr	Walker Produce	Ind. Facility	\$1,200,000.00
	1702 Gulfstream	Valdes Family	4 units Hutchinson Is.	\$599,000.00
	3613 Orange Ave.	Vanantwerp	Commercial Site	\$235,000.00
	3323 Orange Ave.	Lago Investments	Commercial Site	\$230,000.00
	5550 S. US #1	Thames Family	3 acres com. Site	\$825,000.00
Apr-05	1001 N. U.S. #1	Jazzmaz, Inc.	1/4 acre Com. Site	\$130,000.00
	1400 Binney Drive	Teel Trustee	S. Beach Duplex	\$290,000.00
	301 S. 6th St.	Parties & Petals, Inc.	Commercial Site	\$480,000.00
	1119 Hernando Street	Paradis	Duplex	\$420,000.00
	Kings Hwy & Miramar	Freedman Tr.	Multi-Family Site	\$1,000,000.00
	Okeechobee Rd. & I-95	Curtis Trustee	13 acre Interstate Site	\$2,550,000.00
	440 Peacock Rd.	Adams Ranch, Inc.	29,350 Sq. Ft. Whse. - St. Lu	\$2,350,000.00
May-05	6019 S. U. S. #1	Loupe Family	9 acres S. U. S. #1	\$1,200,000.00
	Seaway Dr. & S. Ocean Dr.	Rollins Family	1.3 acre Inlet View Site	\$1,800,000.00
	1123 Hernando Street	Wood	Duplex	\$450,000.00
	Wilder St.-Daytona	Daytona Investments	Multi-Family Site	\$1,900,000.00
	1523 Jenkins Rd.	Odom Family	5 acre Site	\$500,000.00
	Sapp Rd.	Sawgrass Lane Ltd.	Industrial Site	\$1,410,000.00
Jun-05	Cardamine St., Indiantown	Swenson Family	Hydroponic Nursery	\$550,000.00
	Commercial Circle	Unifirst Corp	Industrial Lots	\$530,000.00
	411 S. Ocean Dr.	Ocean Edge LLC	Oceanfront Townhome Site	\$4,650,000.00
	122 Avenue C	Main Street-Ft. Pierce	Historic Office Bldg	\$325,000.00
	440 Concourse	Madden Tr.	Industrial Site - St. Lucie We	\$575,000.00
	Orange Ave. & I-95	Jana Park Inc.	53 Acre I-95 Interchange Site	\$5,030,000.00
	440 Concourse	Nichols/Madden	1.33 Acres	\$575,000.00
Jul-05	2505 & 2801 Orange	Volante Properties	Orange Ave. Site	\$250,000.00
	Orange Ave & I-95	Trenary Properties	Orange & I-95 (5 ac)	\$800,000.00
	4405 S US #1	Rick Starr	Auto Dealer Facility	\$2,000,000.00
	6708 Gaddy	Darville	Lkwood Pk Day Care	\$475,000.00
	500 Stadium Dr.	Cappozoli/Donahue	3.36 Acres St. Lucie West	\$1,250,000.00
	Sun Citrus Blvd	Cushman Fruit Co.	Industrial Site	\$249,000.00
Aug-05	Gordy Rd	R.J. Financial	80 ac - Multi-family	\$6,100,000.00
	1401 N 2nd St	AHJ, LLC	51,000 sf Ind. Fac.	\$3,000,000.00
	1106/1110 S US #1	Freeman/Daminano	Commercial Bldg.	\$700,000.00
	6489 S US #1	Awesome Ranch, LLC	Okeechobee RE Dev. Site	\$2,500,000.00
Sep-05	CONFIDENTIAL	Withheld	15 Ac AG/Office Dev. Site	\$3,000,000.00
	Williams & McCarty	Barley Family	36.7 Acres	\$1,330,000.00
	St. James & Airoso	James Family	Commercial Corner	\$570,000.00
	Moscarelli/Altadonna	2765 PSL Blvd.	4 Lot Package	\$660,000.00
	110 S. US #1	JMS Properties	Downtown Strip Cntr	\$600,000.00
Oct-05	S US #1	Joan, LLC	Commercial Site	\$650,000.00
	1142 Binney Dr.	Gordon Family	Island Duplex	\$389,000.00
	S US #1	Keys Family	Commercial Car Lot	\$695,000.00
	18905 Orange Ave Ext	Tigers For Tomorrow	30 Acres	\$1,321,240.00
	2607 Kerr	Cleveland/Polk	Commercial Bldg.	\$200,000.00
Nov-05	5203 S US #1	Keys Trustee	Automotive Facility	\$695,000.00
	2140 Bell Ave	Privilege Dev	5 Acre Site	\$490,000.00
	526 N 26th	D & L Group	8 Unit Package	\$330,000.00
	N US #1	Moldavia Marble	Commercial Site	\$650,000.00
Dec-05	526 Ave A	Furniture Lay Away	Commercial Bldg.	\$925,000.00
	Melody Lane	IMC Communities	36 Unit Riverfront Site	\$4,000,000.00
	25th & Edwards	Terpening Engineers	Professional Office Site	\$750,000.00
	25th & St. Lucie Blvd.	Hancock Family	Commercial Corner	\$225,000.00
<b>2006 SALES</b>				
Jan-06	5685 4th St., Vero	Keen Family	Development Site	\$4,150,000.00
	1230 Seaway Dr.	Mipal Realty	Holiday Inn Express	\$7,880,000.00
	201 S Ocean Drive	ARRP Trust	Former Circle K	\$690,000.00
	S US #1		Multi-Family Site	\$1,100,000.00
	926 Wagner	Kruse Properties	Duplex	\$140,000.00



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**QUESTIONNAIRE - #7**

Feb-06	2604 Ave. D	Coe Properties	7 Unit Package	\$390,000.00
Mar-06	Kings Highway Industrial Park	Bria Family	Industrial Site	\$590,000.00
	US-1 & Ave H	Dunford Properties	Commercial Site	\$326,000.00
	Kings Hwy	Freedom Investment	80 Acres Commercial Reside	\$3,800,000.00
	1101 N. US-1	Wilson Properties	Commercial Bldg.	\$385,000.00
Apr-06	25th St.&Edwards Rd.	Sabin Properties	14 Acres Commercial Site	\$2,221,000.00
May-06	Enterprise Rd.	84 Lumber	13.8 Acre Industrial Site	\$2,422,350.00
	Orange Ave at Jenkins	Hoeffner Family	30 acre Residential Site	\$3,056,200.00
	Enterprise Rd.	Hughes Supply	5,000 sq. ft. Industrial Buildir	\$144,584.00
Jun-06	Peacock	Grober/Design Center	3 Acres Industrial Site - S.L.V	\$1,950,000.00
Sep-06	Sarasota, FL	84 Lumber	30,000 sq.ft. Ind. Bld'g on 10	\$3,575,000.00
Oct-06	11315 US #1, Vero Beach	Jarvis	US#1 Commercial Site	\$525,000.00
Dec-06	5113 LaSalle St., Ft. Pierce	Cunningham	Triplex	\$236,000.00
<b>2007 SALES</b>				
Jan-07	Panama City, FL	84 Lumber	10 Acre Industrial Site	\$1,354,816.00
Feb-07	Titusville, FL	84 Lumber	10 Acre Industrial Site	\$1,100,000.00
	1931 Crestview	Herbst	Duplex - Hutchinson Island	\$379,000.00
	440 Peacock Blvd.	ABC Building Supplies	Industrial Building Lease	\$955,644.00
Mar-07	Orange Avenue	Turner Family	18 acres mixed use site	\$3,300,000.00
	3405 Industrial 29th	Ashley Aluminum	Industrial building	\$875,000.00
May-07	1412 S. US #1	S & S Land Co.	Commercial site	\$950,000.00
	1150 S. US #1	S & S Land Co.	Commercial site	\$695,000.00
	1110 S. US #1	S & S Land Co.	Commercial Site	\$885,000.00
Jun-07	6395 Heritage	Vera	Condo Warehouse	\$150,000.00
	DiGiorgio	84 Lumber	13 Acres Industrial Site	\$1,732,500.00
Jul-07	Leeper Road	Platts Trust	37 Acres Agricultural Land	\$672,700.00
	7469 Commercial Circle		3 Yr. Industrial Lease	\$140,250.00
	2nd Street, Fort Pierce	Adams Ranch	Office Site	\$375,000.00
Aug-07	1107 Hernando St.	Herbst	Duplex - Hutchinson Island	\$240,000.00
Sep-07	3998 N. US Hwy. 1	Delaporte A/C	Mixed Use Property	\$260,000.00
	504 S. 33rd St.	Banner Exterior	Commercial Building	\$400,000.00
	3071 Hammond Rd.	Theo Trust	5 Acres - Industrial	\$340,000.00
	15860 West Park Ln.	Wild Family	6+ Acres Industrial	\$850,000.00
Oct - 07	414 & 1234 Ave. D	City of Ft. Pierce	Redevelopment properties fo	\$332,500.00
Nov - 07	12101 Orange Ave.	Varn Citrus	Trucking Facility	\$955,000.00
	Pueblo Viejo Lease	Pueblo Viejo	Restaurant Lease - Okeech	\$300,000.00
Dec-07	727 North US # 1	VA Administration	Officer Space Lease for VA	\$109,000.00
<b>2008 SALES</b>				
Jan-08	Jenkins & Orange Ave.	FPUA	Utility Lift Station Site	\$525,000.00
Feb-08	701-707 S. 24th St.	Smith Holding	8 Rental Unit Complex	\$515,000.00
Mar-08	1050 S. 37th St.	Mount Bethel Church	5 Acre Church Site	\$250,000.00
	3731 Oleander Ave.	Lunstrom Industries	18,000 Flex Space Bld'g.	\$960,000.00
May-08	2431-2519 Seneca Ave.	Greenstien Properties	4 Investment Homes	\$240,000.00
June-08	2203 Orange Avenue	Childs' Family	Automotive Service Bld'g.	\$285,000.00
	510 Orange Avenue	Andrew Investments	Downtown Commercial Bld'g	\$515,000.00
July-08	1405 N. 25th St.	Marble Unlimited	6 Unit Apartment Bld'g.	\$154,000.00
Aug-08	3001 Industrial Avenue	BANJO Holdings	10,000 Sq.Ft. Industrial Bld'g	\$850,000.00
	Singer Island - Palm Bch. Cty.	Optimum Investments	Waterfront Development Site	\$2,100,000.00
	Pratt Whitney Road	Optimum Investments	Martin County Land	\$1,200,000.00
Oct - 08	1815 20th St., Vero Beach	Sims Family	Office Building	\$680,000.00
	7118 Farmers Market Road	Gary Ashton	Warehouse	\$349,000.00
	1104 Colonnades	Crazy Nicks- So. Beach	Operating Restaurant	\$75,000.00
	1463 SE Village Green	Sudymont	Warehouse Condo	\$38,000.00
Dec-08	1905 Okeechobee	Rochester Properties	Retail Site	\$100,000.00
	1380 St. Lucie West Blvd.	ARCCO, Inc.	NNN Leased Tire Kingdom	\$1,800,000.00
<b>2009 SALES</b>				
Mar - 09	U.S. Hwy. 1	Green & Rep	5 year Retail Lease	\$180,900.00
	Prosperity Dr, Ft. Pierce	Strang Whse.	5 year Industrial Lease	\$570,000.00
Apr - 09	301 S. U.S. Hwy. 1	Richards Estate	Historic Commercial Bld'g.	\$125,000.00
May - 09	2844 S. Kings Hwy.	Tri-County Towing	Commercial Interchange Site	\$535,000.00
	Nebraska Avenue	(Buyer Confidential)	Medical Office Building	\$980,000.00



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**QUESTIONNAIRE - #7**

July - 09	South U.S. 1	Bucchino Estate	1.13 acre Commercial Site	\$350,000.00
Aug - 09	3306 Enterprise Road	Doyle Properties	20,740 sq. ft. Warehouse Co	\$1,150,000.00
	601 North 7th St.	Flowers Properties	Office Building	\$43,500.00
Oct - 09	309 South 7th St.	Wynne Trust	Office Building	\$227,700.00
Nov - 09	2042 Hayworth Avenue	Kenwood Capital	15,000 sq. ft. Warehouse	\$655,000.00
Dec - 09	8229 S. U.S. Hwy. 1, PSL	RAA Properties LLC	2 Free-Standing Retail Buildi	\$420,000.00
	Pelican Center	Med Mark Service	VA Hospital Lease	\$114,665.00
<b>2010 SALES</b>				
Apr-10	Behind 3233 S. US Hwy 1	Martin Car Transport	1/2 Acre Commercial Lot off	\$50,000.00
May-10	3231 South US Hwy 1	Orkin Pest Control	Facility previously leased to	\$350,000.00
	908-910 North 17th St	Pinder Estate	6 Unit Rehab	\$33,000.00
	Wheeler Ter. at I-95	Tri-County Realty	Commercial Site	\$55,000.00
Jun-10	2510 S. US Hwy 1	EZ Pawn	5 year Retail Lease	\$337,922.00
	2nd Street Station	Raines Insurance	2 Year Office Lease	\$19,500.00
Jul-10	1579 SE Lennard Rd., PSL	AMNG Holdings	Medical Office Building	\$490,000.00
	1122 Orange Ave., Ft. Pierce	City of Fort Pierce	6 Unit Apartment Rehab	\$65,000.00
	1339 Seaway Drive	Coke Family	10 Rental Apts - S. Hutchins	\$304,000.00
Aug-10	L-20 Canal Road	Scott Holdings	9 Acre - Future Developmen	\$170,000.00
Sep-10	803-801 Ave G	BCAG LLC	4 Units - Rehab Special	\$38,000.00
Sep-10	Trowbridge Road	Wynne Bld'g.	150 Acre Agricultural Land	\$625,000.00
	502-508 Howie Drive	Cooper Investments	4 Unit Rental Apartments	\$98,000.00
	4513 S. US Hwy 1	City Cars, Inc.	Car Sales Lot - 2 year Lease	\$67,200.00
Oct-10	Panama City, Florida	Pinnacle Development	13 Acre, 192 Unit Apartment	\$1,300,000.00
	Hammond Rd. & St. Lucie Blvd.	Oceanic Transport	Truck Staging Yard, 3 yr. Le	\$63,000.00
Nov-10	106 Depot Drive	Sudio 207	3 Year Beauty Salon Lease	\$26,000.00
	3925 Selvitz Road	Firehouse Youth	3 Year Lease for Church	\$36,000.00
	1806 S 33rd ST	1st Assembly of God	Church Facility & site	\$360,000.00
	831 Kings Highway	Kings Highway LLC	5,000 sq. ft. Industrial Lease	\$90,000.00
	1811 S US Hwy. 1	Morris Satnick Co's.	US # 1 Commercial Site	\$550,000.00
Dec-10	25 Fisherman's Wharf	Miller & Lee	Port Area Property (0.56 acre	\$450,000.00
<b>2011 SALES</b>				
Jan-11	Dollar General	Green & Rep	10 year Retail Lease	\$900,000.00
Feb-11	Header Canal Road	Wynne Building	307 Acres AG land	\$613,560.00
Mar-11	691 Enterprise	Coastal Project	11,700 S.F. Industrial Bldg. 3	\$140,400.00
Mar-11	South 2nd Street	Nutrition World	Retail Lease - 3 years	\$49,200.00
Apr-11	Holly & Palm Avenues	B & K Groves	23 rental units	\$596,700.00
	1007 S. U.S. Highway 1	EverBank	22 Unit Motel Rehab	\$177,000.00
May-11	Ave K & Ave L	Regions Bank	23 Units - Rehab	\$250,000.00
	Carlton Road Parcel	Kennedy Groves	68 Acres - Ag Only Land	\$130,000.00
	South U.S. 1	Harbor Insurance	Office Lease - 5 years	\$227,240.00
	South 6th Street	Early Learning Coalition	Office Lease - 3 years	\$152,385.00
Jun-11	3063 & 3089 Old Edwards	Indian River State College	Four Units	\$204,000.00
	1702 Gulfstream Ave.	Campos Investments	Four Units - South Beach	\$250,000.00
Jul-11	808 & 902 N. Lake Drive	Martin County Properties	Duplexes	\$104,000.00
	3430 North US 1	Plainsman Investments	1.75 Acres on N US 1	\$100,000.00
	Cross Roads Commerce Park	Tri-County	1.2 Acres Commercial	\$70,000.00
	8515 South US 1	US First Property	Medical Condo	\$95,000.00
	South 6th Street	Daniel M. Foundation	Office Lease - 2 years	\$17,052.00
Aug-11	North US Hwy. 1	Indian River State College	Unbuildable Commercial Lot	\$18,000.00
	301 South 6th Street	Wynne Foundation	Office Building Site	\$165,000.00
Sep-11	1210 Hartman Road	1st Assmeby of God	Church Facility & site	\$264,500.00
	11201 Midway Road	Firefighters Benevolent	Union Hall site	\$239,500.00
Oct-11	Orange & 11th St.	Charlie's Pastries	Small Commercial Site	\$21,000.00
	2624 S. US Highway 1	Wells Fargo Bank	Former Auto Sales Facility	\$255,000.00
Nov-11	308 Hernando Street	Cohen Properties	4-plex on South Hutchinson	\$205,000.00
	NW 72nd Street	PNC Bank	40 Acres - Okeechobee, lirr	\$50,000.00
	Pelican Plaza	MedMark	One Year Lease - Medical S	\$98,000.00
	2nd Street Station	Treasure Coast Yogurt	Two Year Retail Lease	\$21,000.00
Dec - 11	609 Ixoria Avenue	Ft. Pierce Properties LLC	Four Apartments	\$63,000.00
<b>2012 SALES</b>				
Jan - 12	Riviera Beach, FLK	Gale Insulations	One Year Lease - Industrial	\$38,400.00



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**QUESTIONNAIRE - #7**

Jan-12	515 North US Hwy 1	Quinn's Automotive	Five Year Lease - Car Lot	\$36,000.00
Feb - 12	1331 Binney Drive	Meyer Investments	Duplex - South Beach	\$138,000.00
	958 Revels Lane	Bredemeyer	Duplex - Fort Pierce	\$55,900.00
	1206 Carlton Court	Dahan Properties	8 Unit Apt. Building - South E	\$370,000.00
	415 Georgia Avenue	Dollar Tree	Five Year Lease - Retail Sto	\$376,875.00
	2222 Colonial Drive	Harbor Federal Bank	Three Year Office Lease	\$142,200.00
	7361 Commercial Circle	Agro-Land O Lakes	10,000 sq. ft. Industrial Build	\$320,000.00
	First Source Park	Shalipan	7,000 sq. ft. Church Lease	\$210,000.00
	First Source Park	Shalipan	1,700 sq. ft. Truck Leasing C	\$30,600.00
Mar - 12	Brooks County, Texas	Trevino Family	273 Acres	\$306,735.00
	15,000 Sq. Ft. Retail Space	Dollar Tree	5 Year Lease	\$376,875.00
	2222 Colonial Road	Colonial Associates	Office Lease	\$142,200.00
May - 12	Orange Ave. Extension	White Holdings	56 Acres AG Land	\$179,200.00
	Eagle Island Rd.	Federal Land Bank	20 Acres	\$55,000.00
	801 & 805 N. Indian River Dr.	Borinino Investments	8 Unit, Waterfront Historic Ap	\$451,000.00
	1461 Commerce Center	Allied Precision	35,000 S.F. Manufacturing F	\$950,000.00
	801 King Orange	B & K Groves	16 Unit Apartment building	\$384,000.00
June - 12	3515 S 35th Street	IRSC	4 Acres for College Expansio	\$275,000.00
	2718 Pineview	IRSC	5 Acres for College Expansio	\$275,000.00
	I-95 & Orange Ave.	Trenary Trucking	4 Acres I-95 & Orange Aven	\$460,000.00
	595 N. Header Canal Rd.	E & O Land Ranch Trust	76 Acres AG Land	\$300,000.00
	2001 Georgia Ave & 951 King O	B & K Groves	32 Apartments	\$880,000.00
	820 35th St., Vero Beach	Denedlos Holdings	Warehouse	\$350,000.00
	160 E Cocoa Bch Causeway	Yin Yip	Commercial building	\$1,000,000.00
July - 12	7305 Commercial Circle	Commonwealth Multi-Pro	14,776 SF Office building in	\$175,000.00
Sep - 12	4510 N US 1, Palm Shores	Delbo	Commercial building	\$135,000.00
Aug - 12	2222 Colonial Road	Harbor Community Bank	Office Lease	\$57,600.00
	3341 S. US Hwy. 1	Schall Investments	Handyman Warehouse build	\$77,000.00
	480 S. Ocean Drive	B B & T	2-Unit Oceanfront Lot	\$300,000.00
	2838 S. US Hwy. 1	Brandenburg	Restaurant building	\$400,000.00
	1010 E New Haven, Melbourne	Dano Trust	Retail Building	\$425,000.00
	7060 Industrial, Melbourne	Talbot	Industrial Warehouse	\$145,000.00
OCT - 12	712 Avenue A,	Nguyen	Warehouse	\$116,000.00
Nov - 12	604-610 Ixoria Ave.	City National Bank	32 unit Apartment building	\$735,200.00
	3610 S. US Hwy. 1	Van Dyke LLC	2.63 Acres commercial prop	\$50,000.00
	3055 N. US Hwy 1	Wesleyan Church	3055 N. US Hwy 1	\$225,000.00
	508 N. 15th St.	Delphose Properties	6 handyman apartments	\$34,900.00
	1000 S. US Hwy. 1	PNC Bank	6,000 sq.ft. handyman comm	\$75,000.00
Dec - 12	3095 Oleander	Suntrust Bank	Warehouse building	\$550,000.00
	3959 S. US Hwy. 1	Anderson	Commercial building	\$163,000.00
	4712 Kirby Loop Rd.	BLL Holdings LLC	Day Care Center	\$145,000.00
	1555 Indian River Blvd.	Bridgewater Investments	1,738 SF Office Condo in Ver	\$225,000.00
<b>Sales 2013</b>				
Jan-13	3100 N. Kings Hwy. Ft. Pierce	DVT Hurricane Shutters	Retail Building	\$250,000.00
	1575 Indian River Blvd, Vero Bc	Bridgewater Investments	1,800 SF office condo in Ver	\$225,000.00
Feb-13	575 NW Mercantile Pl., PSL		Office Condo	\$55,000.00
	2215 Naylor Pl, Ft. Pierce	GSP I	10 Units - townhomes	\$95,000.00
	723 S. 7th St.		Older Apartment building in f	\$85,000.00
	tbd Orange Ave., Ft. Pierce		Commercial lot	\$50,000.00
	2101 Sunrise Blvd., Ft. Pierce		Free standing office building	\$55,000.00
Mar-13	1575 Indian River Blvd, Vero Bc	Bridgewater Investments	1,850 SF Office condo in Ver	\$172,250.00
Apr-13	816 11th Ct., Vero Beach		Commercial warehouse with	\$80,000.00
	707 New Haven, Melbourne		Retail building	\$215,000.00
	1970 Viera Blvd, Melbourne	Long Doggers	Restaurant	\$275,000.00
May-13	Huntington Place, Vero Beach	Kite Properties	Single Family development	\$1,754,500.00
Jun-13	675 Beachland Blvd., Vero Bch.	Lincoln Interiors	Free Standing Office building	\$1,500,000.00
Jul-13	275 18th St. Vero Beach	Live Oak Medical	Class "A" 10,000 SF Medical	\$2,350,000.00
	1609 19th Pl, Vero Beach	A & K Enterprises	Office building	\$80,000.00
	130 S. Indian River Dr.	The Renaissance	4th floor office suite	\$80,000.00
Jul-13	4520 Old Dixie Hwy., Palm Bay	Land Holding	Free standing 2-story office b	\$300,000.00
Aug-13	1335 Hwy 1, Vero Beach	KGP Enterprises	Free standing Restaurant - 5	\$480,000.00
Sep-13	NE Orange Ave. Ft. Pierce	L & G Groves, Inc.	39.7 Acre producing grove	\$400,000.00
	1575 Indian River Blvd, Vero Bc	Bridgewater Investments	2,040 SF office condo in Ver	\$270,000.00



**BID PROPOSAL RFP NO. 2016-012**

**QUESTIONNAIRE - #7**

Nov-13	867 & 869 S. Kings Hwy. 585 13th Place, Vero Beach	Whse/office condos AYR Investment LLC	Flex Space - 2 units, 3 yr. lease 8 unit apt. building in downtown	\$60,528.00 \$305,000.00
Dec-13	3206-3210 Louisiana Ave 1140 7th Court, Vero Beach	PNC Bank Whiting Pediatrics	24 unit apartment building in 2-Story Office building with 4	\$550,000.00 \$305,000.00
<b>2014 SALES</b>				
Jan-14	Angle Road, Fort Pierce, FL 7765 144th St. B-3, Sebastian 3240 Cardinal Dr., Vero Beach	GH Modern AG Intern'l. HF Properties Orchid Island Trading Center	154 Acres, zoned AG-5 Office Condo, 900 SF 3 Year Lease on Premiere of	\$600,000.00 \$126,000.00 \$234,414.00
Feb-14	500 Trowbridge Rd., Ft. Pierce 530 S US Hwy 1, Ft. Pierce TBD Kings Hwy., Ft. Pierce 3550 US Hwy 1, Ste. 9, Vero Beach 345 Prima Vista, Port St. Lucie 1834 Wilbur Ave., Vero Beach 1375 Hwy. 1, Vero Beach	PNC Bank MBSA 2 Rita's Ice Gulfstream Business Bank Sunshine Furniture Fun City	Bank-owned, 11.62 acres, In Free-standing, 1058 SF Bldg Bank-owned, 77 acres Strip Mall location, 5 year lease Office condo in St. Lucie We Warehouse divided into three Strip Mall location, 10 year lease	\$100,000.00 \$125,000.00 \$595,360.00 \$93,599.00 \$95,000.00 \$250,000.00 \$1,375,000.00
Mar-14	1575 Indian River Blvd., Vero Beach 300 S. 6th St., Fort Pierce	T C Venture (Seacoast) City of Ft. Pierce & FPUA	Office Condo in premium location 27,248 SF office bldg. on entrance	\$245,000.00 \$500,000.00
Apr-14	3310 S US Hwy 1, Ft. Pierce 130 S Indian River Dr. Ft. Pierce 1606 Avenue D, Ft. Pierce 1575 Indian River Dr., Vero Beach 1018 N 25th St., Ft. Pierce	Bev Smith Toyota Renaissance office suite 4 Unit apartment building T C Venture (Seacoast) Rosco Development	27+ acres on US Hwy 1 Renaissance office suite 4 Unit apartment building Office Condo in premium location 15 Unit apartment complex	\$850,000.00 \$180,000.00 \$160,000.00 \$215,000.00 \$350,000.00
May-15	607 Orange Av., Ft. Pierce 2221 S. Rock Rd., Ft. Pierce 900 S. US Hwy 1, Ft. Pierce		Retail/Office building in downtown Cold War Era "Bomb Shelter" .65 Acre site on US 1 near downtown	\$100,000.00 \$325,000.00 \$152,500.00
Jun-14	1340 US Hwy 1, Vero Beach 1436 Old Dixie Hwy, Vero Beach 606 S 5th St., Ft. Pierce 1705 20th St., Vero Beach Coconut Palm Rd., John's Island 4105 Kings Hwy, Ft. Pierce 5685 4th St., Vero Beach 2222 Colonial Rd., Ft. Pierce	Oculina Bank Vero Commerce Center Rollins Foundation MCNA Land Properties Harbor Community Bank	Lg. restaurant sold for new business 10 year lease, 2,850 SF retail 1926 Apartment building needing 2,200 SF Office duplex in Vero Beach 3 Waterfront development parcels Bank-owned, 39 acres Bank-owned, 37 acres developed Office Building Suite - 5 year lease	\$850,000.00 \$190,000.00 \$125,000.00 \$130,000.00 \$2,985,000.00 \$270,000.00 \$462,000.00 \$120,000.00
Jul-14	4301 N. US Hwy 1, Ft. Pierce 1922,34,36,40 21st Av., Vero Beach 1727 Okeechobee Rd., Ft. Pierce	Rochester Mortgage	16 acres, commercial land 8 Unit apartment complex 4,000 SF strip center	\$350,000.00 \$340,000.00 \$310,000.00
Aug-14	2046 S US Hwy 1, Ft. Pierce 333 17 St. Ste. A & B, Vero Beach 4760 S. US Hwy 1, Ft. Pierce	Knights of Columbus Soundview Property Mgmt O'Reilly's Auto Parts	Lg. commercial building on a 10 3 year lease of office condo in One acre commercial site	\$250,000.00 \$93,875.87 \$399,000.00
Sep-14	150 Magnolia Ave., Daytona Beach TBD Smallwood Av., Ft. Pierce	Magnolia Equity Trust, Ltd	Office building in downtown area 12.9 acres residential land	\$975,000.00 \$95,000.00
Oct-14	4006 Mariah Cir., Ft. Pierce TBD Mariah Cir., Ft. Pierce 2470 Pineapple Ave., Melbourne TBD Kelly Road, Ft. Pierce 3950 N US Hwy 1, Ft. Pierce 3434 Industrial 33rd St., Ft. Pierce 11085 Old Dixie Hwy., Vero Beach		Commercial warehouse with Industrial land Multifamily apartment building 39.91 acres of industrial land Mixed-use US Hwy 1 parcel 2 Industrial Warehouses on 7.6 Acres bank-owned industrial	\$220,000.00 \$450,000.00 \$435,000.00 \$275,000.00 \$40,000.00 \$305,000.00 \$52,500.00
Nov-14	1200 Hwy 70 E., Okeechobee	Springhill Suites	.7 Acre outparcel adjacent to	\$100,000.00
Dec-14	691 Enterprise Drive, Port St. Lucie 601 21st St., Vero Beach 505 N 39th St., Ft. Pierce	Bank of America/Oculina	17,300 SF Warehouse & office 10 year lease of entire floor in Short sale 2.5 acres industrial	\$1,100,000.00 \$1,143,582.71 \$100,000.00
<b>2015 SALES</b>				
Jan-15	438 & 436 N 7th St., Ft. Pierce 930 S. Harbor City Bv., Melbourne 717 US Hwy 1, Ft. Pierce		Two multifamily duplexes 10,595 SF, 5 year lease of entire Shopping center of US 1 in Ft. Pierce	\$64,000.00 \$583,993.68 \$1,550,000.00
Feb-15	7400 8th St., Vero Beach 3801 Edwards Rd., Ft. Pierce 3300 SW 42nd Av., Palm City 1124 Hernando St., Ft. Pierce Island		10 Acre parcel, equestrian area 8.80 acres Residential land 19,500 SF Office building, 10 MF Apartment building, 5 bldg	\$232,000.00 \$150,000.00 \$1,006,200.00 \$320,000.00
Mar-15	Seaway Drive, S. Hutchinson Island Pulitzer Rd., Ft. Pierce	Square Grouper Restaurant	1.2 acre waterfront commercial 7.49 Acres AG land	\$1,700,000.00 \$95,000.00



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QUESTIONNAIRE - #7

May-15	2405 16th St., Vero Beach	Schlitt Property Management	6 Unit apartment complex	\$275,000.00
	3988 Kings Hwy, Ft. Pierce		Vetrinary Hospital with indoo	\$145,000.00
Apr-15	5201 Turnpike Feeder Rd., Ft. P	Wells Fargo Bank	Bankpowned, 1.79 acres ret	\$160,000.00
	Ixoria Avenue, Fort Pierce	Ft. Pierce Properties, Inc.	8 Investment condos, rented	\$200,000.00
	1230 Old Boynton Rd., Boynton Bch.		6 condos sold as an investm	\$390,000.00
	1720 Okeechobee Rd., Ft. Pierce		Free Standing retail building	\$200,000.00
	940 S Harbor City Bv., Melbourr	Riverside Partnership	6,500+ SF Pffoce building or	\$950,000.00
	4343 N. US Hwy 1, Ft. Pierce	Lloyd Properties Inc.	8,890 SF Retail building in e	\$345,000.00
	2108 Orange Av., Ft. Pierce	Wells Fargo Bank	Free-standing retail building	\$108,000.00
	La Salle Rd. et al, Lakewood Park		6 Duplexes & tri-plexes sold	\$430,000.00



**BID PROPOSAL RFP NO. 2016-012**

**QUESTIONNAIRE - #7**

	801/803 Kings Hwy., Ft. Pierce	Pro Core Sports Nutrition	2 Office/Whse condos - Lease	\$328,037.00
May-15	403 S 6th St., Ft. Pierce		Free-standing office building	\$19,200.00
	4591 N Hwy 1, Ft. Pierce	Gulfstream Business Bank	1.55 Acres commercial land	\$87,100.00
	2050 6th St., Vero Beach	VeroMar Properties, LLC	2-story strip center totaling 1	\$1,500,000.00
	14020 Hwy 1, Sebastian	Bay Street Sebastian, LLC	Retail lease space, one year	\$12,800.00
	8720 20th St., Vero Beach	The Victor Building	Lease space - 3 year lease.	\$38,599.88
	9140 44th Ave., Sebastian	ID Vero Group LLC	5-plex Income property with	\$370,000.00
Jun-15	Kings Hwy, Ft. Pierce	JIT Investment, Inc.	56 acres, one parcel with pro	\$550,000.00
	1301 Delaware Ave., Ft. Pierce	E J Rentals	Small retail strip center need	\$87,000.00
	109 20th St., Ft. Pierce		4-Plex building just off Orange	\$65,000.00
	8th Street, Vero Beach		Two 4.86 parcels, filled & wit	\$205,000.00
	701 S US Hwy 1, Ft. Pierce	Certified Pre-owned Cars,	3 year lease of Lease Option	\$85,200.00
	3940 S US Hwy 1, Ft. Pierce		2 acres on Hwy 1 with 300 ft	\$250,000.00
	2010 Avenue D, Ft. Pierce		Small restaurant on corner l	\$69,000.00
	7500 39th St., Sebastian	Indian River Land Trust	9.72 acres residential develo	\$145,000.00
	6521 SW 39th St., Palm City	FL Community Bank	5 acres from a 10 acre parce	\$130,000.00
	1875 14th Av., Vero Beach		Retail building on downtown	\$360,000.00
Jul-15	2011 S 25th St., Fort Pierce		Multi-tenant office building in	\$635,000.00
	1230 Old Boynton Rd., Boynton Bch.		Final 2 MF Units sold as inve	\$130,000.00
	1555 Indian River B-113, Vero Bch.		Bridgewater Office condo sui	\$170,000.00
	TBD 39th St., Palm City	FL Community Bank	Remaining 5 acres from a 10	\$145,000.00
	2050 6th St., Vero Beach	Kite Miracle Mile Retail LL	5 leases (new & renewal) in t	\$458,849.00
	1542 Guava Av., Melbourne		3 year Lease of Commercial	\$45,000.00
	3405 Ind. 31st St., Ft. Pierce	Pursuit Boats	2 year lease of commercial b	\$247,500.00
	623 S US Hwy 1, Ft. Pierce		.39 Acre lot with old home ne	\$55,000.00
Aug - 15	5720 25th St., Vero Beach		Almost 7 acres of AG land in	\$120,000.00
	TBD Granada St., Hutchinson Island		1.26 acres MF Land sufficien	\$342,500.00
	8266 Old Dixie Hwy., Vero Bch.		.43 Acres commercial land in	\$38,960.00
	13527 US Hwy 1, Sebastian	Rack'n Wagir, LLC	Business Only sale in showin	\$35,000.00
Sep-15				
	1701 Hwy 1 # 9, Sebastian	Plaza One, LLC	Office space in local strip cer	\$12,000.00
	1355-1575 Hwy 1, Vero Beach	Fun City Entertainment	Lg retail space, 5 year lease	\$523,929.95
	1845 Wilbur Av., Vero Beach	Sunshine Furniture Corp.	3,690 SF Whse within the cit	\$275,000.00
	2509 Ave L, Ft. Pierce		5 SF homes in Ft. Pierce for	\$80,000.00
	5270 Hwy 1, Palm Shores		High profile RV Dealership &	\$2,900,000.00
	9200 Orange Ave.		Estate sale. 18 Acres with o	\$150,000.00
Oct-15	3650 N US Hwy 1 Ft. Pierce	Worldwide Marketing Tec	3 Acres located between US	\$125,000.00
	1575 Indian River Dr. C-210	Schlitt Properties LLC	Bridgewater Office condo, 2	\$29,620.32
	1660 Old Dixie Hwy., Vero Beach	Sunshine Furniture Corp.	6,000+ SF commercial whse	\$784,000.00
	1701 Hwy 1 # 3, Sebastian	Plaza One, LLC	2 year lease to Insurance Co	\$22,000.00
	1701 Hwy 1 # 6 & 7, Sebastian	Plaza One, LLC	2 year lease to Retail store	\$44,000.00
	2508 Acrom, # C, Ft. Pierce		Small medical office, one year	\$10,200.00
	510 S US Hwy 1 Ft. Pierce	Lloyd Properties LLC	5 year lease 8,666 sf office b	\$360,640.00
	2201 S 25th St. #D, Ft. Pierce	Autz, Inc.	Medical Office, 5 year Renew	\$108,324.23
	333 17th St., Vero Beach	SIS Realty '89 Ltd.	1 year lease, office space to	\$19,674.50
	1701 Hwy 1 # 4 & 5, Sebastian	Plaza One, LLC	2 year lease to large Mattres	\$43,200.00
Nov-15	1912 23rd Ave., Vero Beach		6 Unit apartment complex, al	\$275,000.00
	680 1st St., Vero Beach	Wells Fargo Bank	Small retail auto building on	\$127,500.00
	Tbd Old Dixie Hwy, Sebastian		1/3 acre lot zoned for industr	\$68,500.00
	1450 Old Dixie Hwy		1 Yr. Lease of 900 SF office	\$11,502.00
	7605 Progress Circle Melbourne		10,000 SF Ind whse/distribut	\$505,000.00
Dec-15	21 Royal Palm Pointe, Vero Bea	Anode, Inc. / Royal Palm	Mixed use, office & restaura	\$1,900,000.00
	1300 Angle Road, Ft. Pierce	Land Holding, LLC (PNC)	11 Acres Industrial use land.	\$173,000.00
Dec-15	1580 NW Hayworth Av, PSL	Premiere Lab Supply	5 Yr. Lease - 8,448 SFwhse	\$302,748.15
	TBD Carlton Rd W., Ft. Pierce		81 acres of AG land in the Al	\$291,500.00
	1902 Highway 1, Vero Beach		Restaurant in excellent locat	\$1,065,000.00
	1410 & 1412 N 25th St., Ft. Pierce		Commercial duplex w/ liquor	\$225,000.00
	1550 A1A, Satellite Beach	A1A Investments	Lg. Office building in promin	\$1,096,000.00
	2215 Nebraska Av., Ft. Pierce		Medical Office suite next to h	\$87,000.00



## **List Training/Education of Proposer and Proposer's staff that will be assigned to this project**

Hampton Jackson was born and raised on the Treasure Coast and has had his real estate license for the past eight years. He has actively been selling residential and commercial real estate in St. Lucie County for the past three years. He has attended numerous training programs on listing and selling commercial/industrial properties and he is considered an expert in the field of marketing and promoting large land deals. He has completed advanced training on several methods of alternative financing from the St. Lucie Realtors Association.

Hampton has established relationships with numerous local builders/developers. He is the primary contact with Suncor Properties and is the lead agent on Coldwell Banker Paradise Hoyt Murphy REALTORS® relationship with Wells Fargo Bank, Adams Homes and P & V Properties Management LLC. Hampton specializes in distressed property sales, commercial investments, foreclosures and income producing properties.

Hoyt C. Murphy, Jr. grew up in his family's real estate business which was established in 1949. His first teacher was his father, Hoyt C. Murphy, Sr., one of the founding fathers of real estate in St. Lucie County. In 1981, after graduating from Florida Atlantic University with a major in Real Estate, he joined the company full-time and a year later secured his Broker's license.

In 1984, Hoyt took over as President and CEO of Hoyt C. Murphy, Inc. Realtors. During his reign as president, the company grew from grossing over \$25 Million annually to a high of over \$179 Million and gained the reputation of being the largest and oldest Real Estate brokerage in the county specializing in commercial, industrial and agricultural properties.

Hoyt holds a Certified Real Estate Brokerage Manager Designation (CRB) and has served as past-chairman of the Florida Commercial Brokers Network. He is presently the Treasurer for TCERDA (Treasure Coast Research & Development Authority), currently serves on the board of Gulfstream Business Bank, the St. Lucie County Advisory Board, the Salvation Army and the Advisory Board for the Fort Pierce Redevelopment Agency. He is the past-board member for the EDC, Riverside Bank Advisory Board and former Director of the Ft. Pierce Rotary Club.

### **Hampton Jackson**

Coldwell Banker Paradise  
Hoyt Murphy REALTORS®  
Commercial

411 North US Highway 1  
Ft. Pierce, FL 34950

Phone (772) 461-3250  
Fax (772) 460-2067  
Mobile (772) 494-8402  
hampton.jackson@coldwellbanker.com

### **Hoyt C. Murphy, Jr.**

Coldwell Banker Paradise  
Hoyt Murphy REALTORS®  
Commercial

411 North US Highway 1  
Ft. Pierce, FL 34950

Phone (772) 461-3250  
Fax (772) 460-2067  
Mobile (772) 971-7424  
hmunphyjr@cbcworldwide.com



**BID PROPOSAL RFP NO. 2016-012**

**QUESTIONNAIRE - #8**

Keith D. Kite is the Managing Partner of Kite Properties, an affiliate of Coldwell Banker Commercial Paradise. Keith focuses exclusively on the sale of retail properties throughout the United States. He and his team at Kite Properties specialize in investment sales of single-tenant, net-lease properties, shopping and lifestyle centers. Exclusively representing and servicing retail real estate landlords, owners and investors provides our clients the consistency needed to add value and deliver exemplary service. Keith and the Kite Properties team joined Coldwell Banker Commercial Paradise in 2012 to provide his clients with a nationwide platform, superior marketing and the preeminent name in commercial real estate. Keith has more than 30 years of experience in the retail real estate sales and construction industries. He offers a strong background in real estate investment sales, including ownership, property management, leasing, development, financing and advisory services. His experience provides the expertise his clients require for their real estate investments.

Experience, Integrity, and Excellence define Keith's reputation across the retail real estate industry. His extensive contacts and relationships with owners and buyers - from single assets to multi-unit portfolios and institutional REIT'S - support a strong foundation for marketing retail properties. His expertise coupled with Coldwell Banker Commercial's global platform offers superior marketing exposure for retail properties worldwide.

Keith Kite has knowledge in the sales of hospitality properties. He has developed an 86 room Hampton Inn in Okeechobee, FL (\$10 Million), a Springhill Suites by Marriott, an 83 room hotel (\$12 Million) in Vero Beach, and a Hampton Inn & Suites, 90 rooms in 2015 (\$12.5 Million). All have been Awarding Winning in design and service by Marriott.

Keith Kite has extensive contacts throughout the hotel industry. He attends the Hunter Hotel Conference (see [www.hunterconference.com](http://www.hunterconference.com)) for owners, developers and brokers in the Hospitality Industry. This access to leading development personnel provides an excellent contact base for hotel developer for the King Power Plant Site.

**Keith D. Kite**

Managing Partner  
Kite Properties  
Coldwell Banker Paradise  
Commercial

Vero Beach, FL 32960

Phone (772) 231-9333

Mobile (772) 633-0292

[keith@kiteproperties.c.com](mailto:keith@kiteproperties.c.com)

[www.kitepropertiesllc.com](http://www.kitepropertiesllc.com)



BID PROPOSAL RFP NO. 2016-012

QUESTIONNAIRE - #9

## Provide Market and Advertising Methods

### Commercial Marketing Platform

Coldwell Banker Paradise Hoyt Murphy REALTORS® appreciates the opportunity to submit this proposal for the marketing of this RFP. We have the ability and the desire to be hired for this assignment. We have the necessary market knowledge and capabilities to sell and/or lease these properties.

We view the relationship as a partnership. You have properties to market and we have the expertise and resources to invest to deliver positive results.

### Marketing Approach

Hampton Jackson and Hoyt C. Murphy, Jr. will personally direct the overall marketing campaign to successfully market the properties which the City of Ft. Pierce has interest in selling or leasing.

#### Market Data:

As a refinement, we will continually evaluate the market by gathering additional data on comparable sales and competing properties.

#### Market Methods:

The market is always changing and has substantially changed in the past 18 months. Our marketing platform would consist of newspaper advertisements in Treasure Coast Newspapers, direct mailing to a variety of farm areas of similar properties and neighborhoods, web partnerships such as Loopnet.com, Homes and Land, Co-Star, Landwatch.com, Regional MLS, our Coldwell Banker Commercial platform of specialized websites, create an offering memorandum and custom signage.

We will continue to evaluate the market and advise you of any changes on a monthly basis.

Our target markets are as follows:

- Buyers from the Treasure Coast
- Buyers from Florida
- Buyers from the US, Canada and worldwide
- Treasure Coast Newspapers
- Internet marketing



**QUESTIONNAIRE - #10**

**List knowledge of Public Real Estate Records that will be used by your firm**

The proposer and staff are well versed in St. Lucie County's property appraiser's records and St. Lucie County Clerk of Court research. The public records are a source of verification of land size building square footage and current use. Zoning and potential use are verified through the City of Ft. Pierce building department. Other public sources used for verification of buyers include: Sunbiz.org, and myfloridalicense.com for verification of real estate licenses. Prospecting for buyers proposer uses yellowpages.com plus proprietary data bases.

**QUESTIONNAIRE - #11**

**List method(s) used for rent/lease assessment**

Coldwell Banker Paradise Hoyt Murphy REALTORS® subscribes to several services to provide rent/lease assessments and comparative market analysis (CMA) as well as rent/lease market statistics, this includes the Beaches MLS system, Lease Trac and Co Star. All provide data bases of comparable properties for lease and the rental rates of leased properties.

**QUESTIONNAIRE - #12**

**List method(s) used for background checks**

Our firm uses MAF for background screening and credit checks for all potential tenants. Our lease application gives us authority to run such reports.

**QUESTIONNAIRE - #13**

**List marketing strategies used for leasing properties**

Our firm places signage on the property where permissible. We distribute for lease data through the Multiple Listing Service, on the Internet through CBCworldwide.com, Loopnet, and CoStar. Large space is listed with the state through Enterprise Florida. We directly contact companies to determine if they are looking to relocate or expand we subscribe to Lease Trac and Co-Star. Both systems give us access to perspective national chains looking to lease space in our marketing area. We also do broker tours and open houses for our significant commercial properties.



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**QUESTIONNAIRE - #14**

**List marketing strategies used for properties for sale**

We develop a marketing plan for each property using a combination of online partners, direct mail, direct calls and print advertising. We create marketing packages for each property as attachments for online and mailed marketing all tailored to targets that we identify as prospective buyers, investors and users.

Coldwell Banker Paradise prides itself on its diverse and dynamic marketing program that targets buyers from a variety of geographic and demographic spectrums for both residential and commercial listings.

Targeted direct mail covering 100 miles of Florida's coastline communities.  
Aggressive weekly print advertising, in newspapers and glossy magazines.  
Online presence featuring our listings on the top most visited websites.

**Print Advertising includes:**

Quarterly Buyers Guide  
Monthly nested spadea  
Weekly open house listings

**Direct Mail includes:**

Just listed/just sold postcards to neighboring properties  
Agent branded postcards with featured properties to EDDM carrier routes  
Property flyers

**Online featured listings to:**

coldwellbanker.com  
homes.com  
Trulia.com  
Zillow.com  
loopnet.com  
costar.com

Specific to your Hospitality and Hotel properties, we have an in-house team that specializes in this area. This team would be a part of the marketing platform if we are assigned the marketing of the King Power Plant site in Downtown Ft. Pierce. That site is particularly well suited for a hotel and/or mixed use site. Kite Properties, an affiliate of Coldwell Banker Paradise Hoyt Murphy Realtors has recently completed development of the Hampton Inn in Vero Beach and has several contacts in the Hotel Development Industry. We also use MLS, Loopnet.com, Co-Star, Broker Tours and Open Houses.

**QUESTIONNAIRE - #15**

**List current and past litigation of your firm within the past five years**

Suit filed by Thomas Assaly in regards to an incorrect acreage stated in an Auction Brochure for a transaction in which we represented the buyer. Suit filed out of court for a nominal amount.



**QUESTIONNAIRE - #16**

**Provide a list of three past clients for this size and type property**

1. Lloyd Properties, LLC Attn: Ian Lloyd (772) 519-1845 Lloydiant@aol.com  
Our firm sold and leased a portfolio of properties for the Lloyd Family over the last 24 months including:
  - 1) Commercial Land on South US Hwy 1 – Sold
  - 2) 6,600 SF Office – Leased
  - 3) Sale of former Antique Mall on North US Hwy 1 – Sold
  - 4) Commercial Building at 607 Orange Ave. – Sold
  - 5) Small Office building at S. 7th Street – Sold
  - 6) Home at 2404 Sunrise Blvd. – Sold
  
2. Dr. Ajay Goyal (772) 971-0252 apple7676@yahoo.com  
Our firm has sold Land Parcels to Dr. Goyal and in the last year sold a 11,760 SF Office building at 2011 S. 25th Street. We are currently leasing this office building.
  
3. John Sigler, Managing Director of Florida Pacific Properties LLC (503) 784-0975 JITInvest@aol.com  
Our firm has sold to and for Mr. Sigler numerous industrial acreage tracts in St. Lucie County totally over 200 acres for several million dollars.

**QUESTIONNAIRE - #17**

**Is your firm a member of the Multiple Listing Service (MLS)?**

We belong to seven MLS systems within the State of Florida including Dade MLS which enables us to access brokers who serve South American clients.

11:11:09 AM 1/11/2016

## Licensee Details

### Licensee Information

Name: **JACKSON, HAMPTON JAMES III (Primary Name)**  
Main Address: **200 SW ALLAPATTAH RD  
LOT 9  
INDIANTOWN Florida 34956**  
County: **MARTIN**  
License Mailing:  
License Location:

### License Information

License Type: **Real Estate Broker or Sales**  
Rank: **Sales Associate**  
License Number: **SL3212119**  
Status: **Current,Active**  
License Date: **06/19/2008**  
Expires: **03/31/2016**

**Special Qualifications**      **Qualification Effective**

### Alternate Names

[View Related License Information](#)

[View License Complaint](#)

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**1940 North Monroe Street, Tallahassee FL 32399** :: Email: [Customer Contact Center](#) :: Customer Contact Center: 850.487.1395

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11:10:07 AM 1/11/2016

## Licensee Details

### Licensee Information

Name: **MURPHY, HOYT C JR (Primary Name)**  
Main Address: **2400 SOUTH OCEAN DRIVE  
PENTHOUSE 4200D  
FORT PIERCE Florida 34949**  
County: **ST. LUCIE**  
License Mailing:  
LicenseLocation:

### License Information

License Type: **Real Estate Broker or Sales**  
Rank: **Broker**  
License Number: **BK3260381**  
Status: **Current,Active**  
Licensure Date: **07/03/2012**  
Expires: **09/30/2017**

**Special Qualifications**      **Qualification Effective**

### Alternate Names

[View Related License Information](#)

[View License Complaint](#)

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**1940 North Monroe Street, Tallahassee FL 32399** :: Email: [Customer Contact Center](#) :: Customer Contact Center: 850.487.1395

The State of Florida is an AA/EEO employer. [Copyright 2007-2010 State of Florida. Privacy Statement](#)

Under Florida law, email addresses are public records. If you do not want your email address released in response to a public-records request, do not send electronic mail to this entity. Instead, contact the office by phone or by traditional mail. If you have any questions, please contact 850.487.1395. \*Pursuant to Section 455.275(1), Florida Statutes, effective October 1, 2012, licensees licensed under Chapter 455, F.S. must provide the Department with an email address if they have one. The emails provided may be used for official communication with the licensee. However email addresses are public record. If you do not wish to supply a personal address, please provide the Department with an email address which can be made available to the public. Please see our [Chapter 455](#) page to determine if you are affected by this change.



# **Customer Notice of Privacy Policy and Producer Compensation Practices Disclosures**

## **Privacy Policy Disclosure**

### **Collection of Information**

We collect personal information so that we may offer quality products and services. This information may include, but is not limited to, name, address, Social Security number, and consumer reports from consumer reporting agencies in connection with your application for insurance or any renewal of insurance. For example, we may access driving records, insurance scores or health information. Our information sources will differ depending on your state and/or the product or service we are providing to you. This information may be collected directly from you and/or from affiliated companies, non-affiliated third parties, consumer reporting agencies, medical providers and third parties such as the Medical Information Bureau.

We, and the third parties we partner with, may track some of the web pages you visit through cookies, pixel tagging or other technologies. We currently do not process or comply with any web browser's "do not track" signals or similar mechanisms that request us to take steps to disable online tracking. For additional information regarding online privacy, please see our online privacy statement, located at [www.hanover.com](http://www.hanover.com).

### **Disclosure of Information**

We may disclose non-public, personal information you provide, as required to conduct our business and as permitted or required by law. We may share information with our insurance company affiliates or with third parties that assist us in processing and servicing your account. We also may share your information with regulatory or law enforcement agencies, reinsurers and others, as permitted or required by law.

Our insurance companies may share information with their affiliates, but will not share information with non-affiliated third parties who would use the information to market products or services to you.

Our standards for disclosure apply to all of our current and former customers.

### **Safeguards to Protect Your Personal Information**

We recognize the need to prevent unauthorized access to the information we collect, including information held in an electronic format on our computer systems. We maintain physical, electronic and procedural safeguards intended to protect the confidentiality and integrity of all non-public, personal information, including but not limited to social security numbers, driver's license numbers and other personally identifiable information.

### **Internal Access to Information**

Access to personal, non-public information is limited to those people who need the information to provide our customers with products or services. These people are expected to protect this information from inappropriate access, disclosure and modification.

### **Consumer Reports**

In some cases, we may obtain a consumer report in connection with an application for insurance. Depending on the type of policy, a consumer report may include information about you or your business, such as:

- character, general reputation, personal characteristics, mode of living;
- credit history, driving record (including records of any operators who will be insured under the policy); and/or
- an appraisal of your dwelling or place of business that may include photos and comments on its general condition.

### **Access to Information**

Upon written request, we will inform you if we have ordered an investigative consumer report. You have the right to make a written request within a reasonable period for information concerning the nature and scope of the report and to be interviewed as part of its preparation. You may obtain a copy of the report from the reporting agency and, under certain circumstances, you may be entitled to a copy at no cost.

You also may review certain information we have about you or your business in our files. To review information we maintain in our files about you or your business, please write to us, providing your complete name, address and policy number(s), and indicating specifically what you would like to see. If you request actual copies of your file, there may be a nominal charge.

We will tell you to whom we have disclosed the information within the two years prior to your request. If there is not a record indicating that the information was provided to another party, we will tell you to whom such information is normally disclosed.

There is information that we cannot share with you. This may include information collected in order to evaluate a claim under an insurance policy, when the possibility of a lawsuit exists. It may also include medical information that we would have to forward to a licensed medical doctor of your choosing so that it may be properly explained.

### **Correction of Information**

If after reviewing your file you believe information is incorrect, please write to the consumer reporting agency or to us, whichever is applicable, explaining your position. The information in question will be investigated. If appropriate, corrections will be made to your file and the parties to whom the incorrect information was disclosed, if any, will be notified. However, if the investigation substantiates the information in the file, you will be notified of the reasons why the file will not be changed. If you are not satisfied with the evaluation, you have the right to place a statement in the file explaining why you believe the information is incorrect. We also will send a copy of your statement to the parties, if any, to whom we previously disclosed the information and include it in any future disclosures.

### **Our Commitment to Privacy**

In the insurance and financial services business, lasting relationships are built upon mutual respect and trust. With that in mind, we will periodically review and revise our privacy policy and procedures to ensure that we remain compliant with all state and federal requirements. If any provision of our privacy policy is found to be non-compliant, then that provision will be modified to reflect the appropriate state or federal requirement. If any modifications are made, all remaining provisions of this privacy policy will remain in effect. For more detailed information about our customer privacy policy (including any applicable state-specific policies) and our online privacy statement, visit our Web site, located at [www.hanover.com](http://www.hanover.com).

### **Further Information**

If you have questions about our customer privacy policy (including any applicable state-specific policies) or our online privacy statement, or if you would like to request information we have on file, please write to us at our Privacy Office, N435, The Hanover Insurance Group, Inc., 440 Lincoln Street, Worcester, MA 01653. Please provide your complete name, address and policy number(s). A copy of our Producer Compensation Disclosure is also available upon written request addressed to the attention of the Corporate Secretary, N435, The Hanover Insurance Group, 440 Lincoln Street, Worcester, MA 01653.

### **Producer Compensation Disclosure**

Our products are sold through independent agents and brokers, often referred to as "Producers." We may pay Producers a fixed commission for placing and renewing business with our company. We may also pay additional commission and other forms of compensation and incentives to Producers who place and maintain their business with us. Details of our Producer compensation practices may be found at [www.hanover.com](http://www.hanover.com).

This notice is being provided on behalf of the following Hanover Companies: The Hanover Insurance Group, Inc. - Allmerica Financial Alliance Insurance Company - Allmerica Financial Benefit Insurance Company - Allmerica Plus Insurance Agency, Inc. - Citizens Insurance Company of America - Citizens Insurance Company of Illinois - Citizens Insurance Company of the Midwest - Citizens Insurance Company of Ohio - Citizens Management, Inc. - AIX Ins. Services of California, Inc. - Campania Insurance Agency Co. Inc. - Campmed Casualty & Indemnity Co. Inc. - Chaucer Syndicates Limited- Educators Insurance Agency, Inc.- Hanover Specialty Insurance Brokers, Inc. - The Hanover American Insurance Company - The Hanover Insurance Company - The Hanover New Jersey Insurance Company - The Hanover National Insurance Company - Hanover Lloyd's Insurance Company - Massachusetts Bay Insurance Company - Opus Investment Management, Inc. - Professionals Direct Insurance Services, Inc. -Professional Underwriters Agency, Inc. - Verlan Fire Insurance Company - Nova Casualty Company - AIX Specialty Insurance Company.



**DECLARATIONS**

**THIS IS A CLAIMS-MADE POLICY. PLEASE READ THE POLICY CAREFULLY.**

**MISCELLANEOUS PROFESSIONAL LIABILITY POLICY**

Policy Number	Coverage is provided by:	Agency	Agency Code
LHR 9262295 04	HANOVER INSURANCE COMPANY 440 LINCOLN STREET WORCESTER, MA 01653	PBI GROUP	3002772

**Issue Date:** 08/24/2015

**Item 1. Named Insured and Address:**

ED SCHLITT, LLC  
1209 US HIGHWAY #1  
SEBASTIAN, FL 32958

**Item 2. Policy Period:**

Inception Date: 09/01/2015  
Expiration Date: 09/01/2016  
12:01 A.M. Standard Time at the address  
of the Named Insured as stated herein

**Item 3. LIMIT OF LIABILITY**

**Limit of Liability**

**Item 4. DEDUCTIBLE:**

- a. \$1,000,000 for each **Claim**; not to exceed
  - b. \$1,000,000 for all **Claims** in the aggregate
- \$5,000 Each Claim

**Item 5. RETROACTIVE DATE:** 09/01/1983

**Item 6. PROFESSIONAL SERVICES**

Real Estate Agent/Broker and Property Manager Services as defined in the policy including incidental Residential Real Estate Appraisals and Residential Real Estate Auctioneer Services

**Item 7. PREMIUM FOR THE POLICY PERIOD:**

**Total Coverage Premium: \$25,262.00**

**Florida Ins. Guaranty Assoc. Regular Assessment: \$0.00**

**Total Premium: \$25,262.00**

**Item 8. NOTICE OF A CLAIM**

Report any claim to the Company as required by Section **G. DUTIES IN THE EVENT OF CLAIM(S) OR POTENTIAL CLAIM(S)**:

The Hanover Insurance Company  
P.O. Box 15145  
Worcester, MA 01615

**National Claims Telephone Number:** 800-628-0250

**Facsimile:** 800-399-4734

**Email:** firstreport@hanover.com

**Item 9.** Forms attached at issue:

401-1268	(08-12)	U.S. Treasury Department's Office of Foreign Assets Control ("OFAC") Advisory Notice to Policyholders
910-0001FL	(12-09)	Florida Miscellaneous Professional Liability Insurance Policy
910-0006	(11-12)	Notice to Florida Insureds
910-0010FL	(10-09)	Florida Acceptance of Application(s) Endorsement
910-0015	(10-09)	Change of Name or Address Endorsement
910-0018	(03-10)	Consent to Settle Amendment Endorsement
910-0019	(03-10)	Consent to Specific Legal Counsel Endorsement
910-0084	(01-12)	Retroactive Dates for Split Limits of Liability Endorsement
910-0085	(01-12)	Additional Insured Endorsement
910-0140	(10-11)	Notice to Policyholders: Information Regarding Extended Reporting Period ("ERP Coverage")
910-0162FL	(01-12)	Florida Bodily Injury or Property Damage Endorsement with Commercial General Liability Insurance
910-0170FL	(01-12)	Florida Environmental Hazards Endorsement
910-0198FL	(01-15)	FAIR HOUSING ACT COVERAGE
910-0701	(01-12)	Independent Contractor Endorsement
910-0704	(01-12)	Limited Additional Insured Franchisor Endorsement
910-0714	(01-12)	Real Estate Appraiser Endorsement
910-0716FL	(01-15)	REAL ESTATE PROFESSIONAL SERVICES ENDORSEMENT
910-0767FL	(01-15)	SEVERABILITY FOR PERSONAL CONDUCT EXCLUSION
910-0769FL	(01-15)	AMEND CHANGE IN OWNERSHIP CONTROL OR EXPOSURE
910-0770FL	(01-15)	SUBPOENA ASSISTANCE COVERAGE SUBLIMIT
910-0772FL	(01-15)	LIMITED DISCRIMINATION COVERAGE SUBLIMIT
SIG-1100	(08-14)	Signature Page

**Item 10.** Producer Name and Address: PBI GROUP  
23114 EXPEDITION DRIVE ASHBURN VA 20148



**U.S. TREASURY DEPARTMENT'S  
OFFICE OF FOREIGN ASSETS CONTROL ("OFAC")**

**ADVISORY NOTICE TO POLICYHOLDERS**

No coverage is provided by this policyholder notice nor can it be construed to replace any provisions of your policy. You should read your policy and review your Declarations page for complete information on the coverages you are provided.

This notice provides information concerning possible impact on your insurance coverage due to directives issued by OFAC. **Please read this notice carefully.**

The Office of Foreign Assets Control ("OFAC") administers and enforces sanctions policy, based on Presidential Declarations of National Emergency.

OFAC has identified and listed numerous foreign agents, front organizations, terrorists, terrorists organizations, and narcotic traffickers as "Specially Designated Nationals and Blocked Persons". This list can be located on the United States Treasury's web site: <http://www.treas.gov/ofac>.

In accordance with OFAC regulations, if it is determined that you or any other insured, or any person or entity claiming the benefits of this insurance has violated United States sanctions law or is a Specially Designated National and Blocked Person, as identified by OFAC, this insurance will be considered a blocked or frozen contract and all provisions of this insurance are immediately subject to OFAC. When an insurance policy is considered to be such a blocked or frozen contract, no payments nor premium refunds may be made without authorization from OFAC.

Other limitations on the premiums and payments also apply.

**FLORIDA MISCELLANEOUS PROFESSIONAL LIABILITY INSURANCE POLICY**

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**FOR ANY INQUIRIES CALL:**

**800-685-5669**

## MISCELLANEOUS PROFESSIONAL LIABILITY INSURANCE POLICY

This is a **CLAIMS-MADE AND REPORTED** policy. Subject to the terms, conditions, exclusions and limitations of this policy, coverage is limited to liability for only those claims that are first made against you and reported to us in writing after the retroactive date and during the policy period or any optional extended reporting period, if exercised by you.

This is a “defense within limits” policy with claim expenses included within the limit of liability. The limit of liability available to pay damages will be reduced by amounts we pay for claim expenses as defined in the policy. Further note that amounts incurred for claim expenses and damages are subject to the deductible.

Please read this policy carefully.

Throughout this policy, the terms **we**, **us** and **our** refer to the **Company** providing this insurance. The terms **you** and **your** refer to the persons and entities insured under this policy. Other terms in bold print have special meaning and are defined in the policy.

### A. COVERAGE – WHAT THIS POLICY INSURES

#### 1. Professional Services Coverage

We will pay on your behalf those sums which you become legally obligated to pay as **damages** and **claim expenses** because of any **claim** made against you arising from a **wrongful act** in the rendering or failure to render **professional services** by you.

The following additional requirements and limitations shall apply to coverage provided under **A.1** above and **A.3.** and **A.4.** below:

- a. The **wrongful act** must have first occurred on or after the applicable **retroactive date(s)**;
- b. You had no knowledge of facts which could have reasonably caused you to foresee a **claim**, or any knowledge of the **claim**, prior to the effective date of this **policy**; and,
- c. The **claim** must first be made and reported to **us** in writing during the **policy period** or any **extended reporting period**, if applicable, and must arise from any **wrongful act** to which this **policy** applies.

#### 2. Disciplinary Proceedings Coverage

We will pay on your behalf only **defense expenses** incurred in responding to a **disciplinary proceeding** commenced against you and reported to us in writing during the **policy period**, or which was commenced during the **policy period** and, if exercised, reported to us in writing during any optional **extended reporting period**. The maximum amount available for **defense expenses** for a **disciplinary proceeding** is \$25,000 for each **policy period**, regardless of the number of **disciplinary proceedings**. Any payment made hereunder shall not be subject to the deductible and shall not reduce any applicable limit of liability. Inclusive within this coverage, we will pay up to \$250 per day for any salaries and expenses of your employees required to attend or participate in any **disciplinary proceeding**. We shall not pay any **damages** incurred as a result of **disciplinary proceedings**.

#### 3. Personal Injury Coverage

We will pay on your behalf those sums which you become legally obligated to pay as **damages** and **claim expenses** because of any **claim** made against you and reported to us in writing during the **policy period**, or any **extended reporting period**, if applicable, that arise from your **professional services** and are for:

- a. your defamation, libel, slander, product disparagement, trade libel, infliction of emotional distress or other tort related to disparagement or harm to the reputation or character of any person or entity;
- b. your invasion or interference with the right to privacy or publicity, including but not limited to false light, public disclosure of private facts, intrusion and invasion; or
- c. your causing a third party to be subject to false arrest, detention or imprisonment.

#### 4. Technology Professional Coverage

We will pay on your behalf those sums which you become legally obligated to pay as **damages** and **claim expenses** because of any **claim** arising from your **professional services** and made against any **insured** and reported to us in writing during the **policy period**, or any **extended reporting period**, if applicable, that arises from:

- a. the inability of an authorized third party to gain access to **computer services**;
- b. **unauthorized access to computer services** that results in:
  - 1) the destruction, deletion or corruption of electronic data on **computer services**; or
  - 2) denial of service attacks against **computer services** or transmission of **malicious code to computer services**.

## **B. DEFENSE AND SETTLEMENT (INCLUDED IN THE LIMIT OF LIABILITY)**

**We** have the right to investigate and the exclusive right to defend any **claim** made under this **policy**, even if the allegations are groundless, false or fraudulent until there is a final adjudication against **you**. **We** are not obligated to defend any criminal investigation, criminal proceeding or prosecution against **you**. If a **claim** is not covered under this **policy**, **we** will have no duty to defend it.

Payment of **claim expenses** will reduce the amounts available to pay **damages**. **Our** duty to defend any **claim** or pay any amount as **damages** or **claim expenses** will cease when **our** limit of liability has been exhausted. Upon exhaustion of the limits of liability, **we** will tender control of the defense to the **named insured**. The **named insured** agrees to accept this tender of defense.

**We** will not settle a **claim** without the consent of the **named insured**. If the **named insured** refuses to consent to a settlement **we** recommend and which a claimant would accept, then **our** liability for the **claim** will not exceed the amount for which **we** would have been liable for **damages** if the **claim** had been settled as recommended by **us** and acceptable to the claimant, including **claim expenses** incurred up to the date of the **named insured's** refusal. After the time of the **named insured's** refusal, the **named insured** shall be responsible for all **damages** in excess of the amount for which the **claim** could have been settled, and all **claims expenses** incurred thereafter. For the purpose of this section, settlement includes but is not limited to any resolution of a **claim** that would have occurred as a result of any court-ordered process which the **named insured** chose not to accept.

The **named insured** is responsible for any fees or costs charged by a lawyer defending **you** or any other defense expenses incurred without **our** written consent.

## **C. LIMIT OF LIABILITY AND DEDUCTIBLE**

### **1. LIMIT OF LIABILITY**

The limit of liability per claim limit shown on the Declarations page Item 3.a. is the most **we** will pay for the sum of all **damages** and **claim expenses** arising out of a single **claim** or a series of related **claims**, regardless of the number of persons or entities insured under this policy, number of **claims** made or the number of persons or entities making claims during the **policy period** or during any **extended reporting period**, if any.

The Aggregate limit shown on the Declarations Item 3.b. is the most **we** will pay for the sum of all **damages** and **claim expenses** for all **claims** under this policy.

### **2. DEDUCTIBLE**

- a. **You** will pay the deductible amount shown in the Declarations. The deductible applies to each **claim**. **We** will not be required to make any payment for **claim expenses**, settlements reached, or judgments rendered in an otherwise covered **claim** unless and until **you** have paid the deductible in full. **You** must pay the deductible (i) immediately when invoiced or, (ii) in the event that offers of judgment or settlement demands are made which **you** and **we** agree should be accepted, prior to the expiration of the time period for responding to such offers or demands.
- b. All **claim expenses** will first be subtracted from the limit of liability, with the remainder, if any, being the amount available to pay for **damages** after **you** have paid the deductible in paragraph a.
- c. If **you** and **we** agree to use **mediation** to resolve any **claim** brought against **you** and if the **claim** is resolved by **mediation**, **your** deductible obligation for that **claim** will be reduced by 50%.

### **3. REIMBURSEMENT**

In the event that **we** voluntarily choose or are compelled by a court of law to make any payment of the deductible and request reimbursement from **you**, the reimbursement is payable immediately, but no later than thirty (30) days after written demand.

## **D. DEFINITIONS**

**Bodily Injury** means physical injury, sickness or disease and, if arising out of the foregoing, mental anguish, emotional distress, mental injury, shock, humiliation or death at any time.

**Claim** means a written demand or **suit** you receive.

**Claim expenses** means all expenses **we** incur or authorize in writing for the investigation, adjustment, defense or appeal of a **claim**. These expenses include fees charged by a lawyer, mediator or arbitrator with **our** consent for which **you** are obligated. **Claim expenses** also mean:

1. the premium on appeal, attachment or similar bond; and
2. up to \$250 per day per insured for supplemental payment for reasonable expenses incurred for attendance at hearings, trials, or depositions at **our** request or with our consent by such **insured**. Such payment shall not exceed \$5,000 in the aggregate for all **insureds** in each **claim**.

**Claim expenses** do not include:

1. salaries, wages, fees, overhead or benefit expenses associated with any **insured** except as specified in subparagraph 2. above; or
2. salaries, wages, overhead or benefit associated with **our** employees.

**Company** means the insurance company that issued this policy, as shown on the Declarations page or referred to herein as **we**, **us**, or **our**.

**Computer services** means computers and associated input and output devices, data storage devices, networking equipment, backup facilities, and internet sites operated by and either owned by or leased by any third party for whom **you** provide **professional services**.

**Damages** means monetary judgments, awards or settlements unless otherwise excluded. **Damages** includes (i) pre-judgment interest; and (ii) post judgment interest that accrues after entry of judgment and before **we** have paid, offered to pay or deposited in court that part of judgment within the applicable limit of liability.

**Damages** does not mean punitive or exemplary **damages** or the multiple portion thereof.

**Damages** do not include any costs or expenses in complying with any demand for or award of **equitable relief**, even if such compliance is compelled as a result of a judgment, award or settlement.

**Defense expenses** means all expenses **you** incur in investigation, defense or appeal of any **disciplinary proceeding**.

**Disciplinary proceeding** means any proceeding by a disciplinary official or agency to investigate or prosecute charges alleging professional misconduct in the performance of **your professional services**.

**Employment practices** means any actual or alleged:

1. wrongful termination of the employment of, or demotion of, or failure or refusal to hire or promote any person in violation of law or in breach of any agreement to commence or continue employment;
2. unlawful employment discrimination;
3. sexual harassment of an employee or applicant for employment; or
4. retaliatory treatment against an employee on account of that employee's exercise or attempted exercise of his or her rights under law.

**Equitable relief** means a remedy not involving the payment of monetary damages.

**Extended reporting period** means an additional period of time for reporting **claim(s)**. The **extended reporting period** starts on the **policy termination date** and ends at the **extended reporting period** expiration date.

**First inception date** means the inception date of the first Miscellaneous Professional Liability **policy** issued by **us** to the **named insured** and continually renewed by **us** until the inception date of this current **policy**.

**Insured** means:

1. the **named insured**; and;
2. if **you** are a sole proprietorship, any past or present employee of **yours**, but only while acting on **your** behalf in their capacity as an employee;
3. if **you** are a partnership, any past or present general or managing partner, principal or employee of **yours**, but only while acting on **your** behalf in such capacity;
4. if **you** are a limited liability company, any past or present managing member, principal or employee of **yours**, but only while acting on **your** behalf in such capacity;

5. if **you** are a corporation, any past or present officer, director, trustee, or employee of **yours**, but only while acting on **your** behalf in such capacity;
6. **your** temporary or leased employees, but only while acting on **your** behalf as an employee;
7. if **you** are a **subsidiary** of the **named insured**, **you** are only covered while acting on behalf of the **named insured**;
8. **your** lawful spouse solely for liability arising from any **wrongful act** of an **insured** committed without the participation of such spouse;
9. **your** heirs, assigns and legal representatives in the event of **your** death, incapacity or bankruptcy to the extent that **you** would have been covered; or,
10. an independent contractor for **claims** and **damages** under **Section A.1, 3, or 4**, but only while acting on **your** behalf and only if there is a signed agreement executed by the **named insured** and the independent contractor which:
  - a) specifies the services to be performed by the independent contractor on the **named insured's** behalf;
  - b) provides that the services performed by the independent contractor will be under the **named insured's** supervision;
  - c) states that the independent contractor will be indemnified by the **named insured** for the services performed on the **named insured's** behalf; and,
  - d) is entered into before the **wrongful act** which leads to a **claim** or **potential claim**.

**Loss** means **claim expenses**, **damages** and **defense expenses** and does not include **equitable relief**.

**Malicious code** means any virus, trojan horse, worm or similar software program, code or script intentionally designed to insert itself into computer memory.

**Mediation** means the non-binding intervention of a qualified neutral third party chosen by **you** and the other party to a **claim** with agreement by **us**.

**Named insured** means the individual, entity, partnership, or corporation designated as such in the Declarations page.

**Policy** means this **policy** form, the Declarations, and any endorsement to the **policy** issued by **us**, and **your** application, including all supplements.

**Policy period** means the period from the effective date of the **policy** to the expiration date or earlier termination date of the **policy**.

**Policy termination date** means the expiration date of the **policy** as shown on the Declarations page or the cancellation date of the **policy**, whichever is earlier.

**Pollutants** means any solid, liquid, gaseous or thermal irritant or contaminant, including smoke, vapor, soot, fumes, acids, alkalis, chemicals and waste. Waste includes materials to be recycled, reconditioned or reclaimed.

**Potential claim** means any **wrongful act** or any facts or other circumstances which may subsequently give rise to a **claim**.

**Professional services** means those services described in Item 6. of the Declarations which **you** perform for others for a fee.

**Property damage** means (1) physical injury to, loss or destruction of, tangible property including the resulting loss of use thereof; or (2) loss of use of tangible property which has not been physically injured or destroyed.

**Retroactive date(s)** refer to the dates shown in Item 5. of the Declarations. If no date is shown on the Declarations page the retroactive date will be inception date of the policy.

**Subsidiary** means

1. any corporation, identified by **you** in the application for this **policy**, of which the **named insured** owns more than fifty percent (50%) of the issued and outstanding voting stock either directly or indirectly on the inception date of the **policy period**; or
2. any corporation which becomes a **subsidiary** during the **policy period** provided that such corporation does not represent more than a ten percent (10%) increase in the total assets or gross revenue of the **named insured** as of the date of the acquisition. Where such corporation represents an increase in the total assets or gross revenue of the **named insured** of more than ten percent (10%), such corporation shall be deemed a

**subsidiary** under the **policy**, but only upon the condition that within ninety (90) days of its becoming a **subsidiary**, you shall have provided us with full particulars of the new **subsidiary** and agree to any additional premium and/or amendment of the provisions of this **policy** required by us relating to such new **subsidiary**, subject to the review and acceptance by us of full and complete underwriting information. Further, coverage as shall be afforded to the new **subsidiary** is conditioned upon the **named insured** paying when due any additional premium required by us relating to such new **subsidiary**. A corporation becomes a **subsidiary** when the **named insured** owns more than fifty percent (50%) of the issued and outstanding voting stock either directly or indirectly, and ceases to be a **subsidiary** at such time when the **named insured** ceases to own more than fifty percent (50%) of the issued and outstanding voting stock.

**Suit** means a civil proceeding for monetary, non-monetary or injunctive relief, which is commenced by service of a complaint or similar pleading. **Suit** includes a binding arbitration proceeding in which **damages** are alleged and to which you must submit or do submit with our consent.

**Unauthorized access** means the use of or access to **computer systems** by a person not authorized to do so by the **Named Insured**; or the use or access to **computer systems** in a manner not authorized by the **named insured**.

**Wrongful act** and **wrongful acts** means any actual or alleged negligent act, error, omission, or misstatement committed in **your professional services**.

#### E. EXCLUSIONS - WHAT THIS POLICY DOES NOT INSURE

This **policy** does not apply to **claim(s)**

1. based upon, arising out of, or in any way relating directly or indirectly to any **insured**:
  - a) committing any intentional, dishonest or fraudulent act or omission; or
  - b) gaining any profit, remuneration or advantage to which such **insured** was not legally entitled; provided that this exclusion will not apply until a final adjudication establishes a) or b) above.
2. for any willful or criminal violation of any statute, rule or law.
3. for the return, restitution or reduction of professional fees or arising from any demand for **equitable relief**.
4. arising out of **bodily injury** or **property damage**;
5. arising out of:
  - a) any purchase, sale, or offer or solicitation of an offer to purchase or sell securities;
  - b) any violation of any securities law, including the Securities Act of 1933, as amended, or the Securities Exchange Act of 1934, as amended, or any regulation promulgated under the foregoing statutes, or any federal, state or local laws similar to the foregoing statutes (including "Blue Sky" laws), whether such law is statutory, regulatory or common law; or
  - c) any violation of the Organized Crime Control Act of 1970 (commonly known as Racketeer Influenced And Corrupt Organizations Act, or "RICO"), as amended, or any regulation promulgated thereunder or any federal, state or local law similar to the foregoing, whether such law is statutory, regulatory or common law;
6. arising out of any breach of fiduciary duty, responsibility, or obligation in connection with any employee benefit or pension plan, including violations of the responsibilities, obligations or duties imposed upon fiduciaries by the Employee Retirement Income Security Act of 1974 ("ERISA"), as amended, or similar statutory or common law of the United States of America or any state or jurisdiction therein;
7. arising out of any **employment practices** liability or any discrimination on any basis, including, but not limited to: race, creed, color, religion, ethnic background, national origin, age, handicap, disability, gender, sexual orientation or pregnancy;
8. arising out of any misappropriation or misuse of trade secret or infringement of patent, copyright, trademark, trade dress or any other intellectual property right;
9. arising out of false advertising, misrepresentation in advertising, antitrust, unfair competition, restraint of trade, unfair or deceptive business practices, including but not limited to, violations of any local, state or federal consumer protection laws;
10. against you that are brought by or on behalf of any federal, state or local government agency or professional or trade licensing organizations; however, this exclusion shall not apply where the **claim** is alleging a **wrongful act** in your rendering **professional services** to such entity or for a **disciplinary proceeding**;

11. arising out of liability **you** assume under any contract or agreement; however, this exclusion does not apply to liability **you** would have in the absence of such contract or agreement;
12. against **you** that are brought by or on behalf of:
  - a) any business entity that is owned, managed or operated, directly or indirectly, in whole or in part, by **you**;
  - b) any parent company, subsidiary, successor or assignee of **yours**, or anyone affiliated with **you** or such business entity through common majority ownership or control; or
  - c) any independent contractor supplying material or services to **you**;
13. arising out of disputes involving:
  - a) **your** fees or charges, including over-charges, or cost over-runs;
  - b) collecting **your** fees from third parties;
  - c) the return of fees or other compensation paid to **you**; or
  - d) **your** cost of correcting or re-performing or completing any **professional services**;
14. arising out of **your** advising, requiring, obtaining or failing to advise, require or obtain any bond, suretyship or other form of insurance;
15. arising out of or resulting, directly or indirectly, from any actual or alleged commingling, misappropriation or improper use of funds or monies
16. arising out of a **claim** by any **insured** under this **policy** against any other insured under this **policy**.
17. arising out of the actual, alleged or threatened discharge, dispersal, seepage, migration, release or escape of **pollutants** at any time.

#### F. EXTENDED REPORTING PERIOD

1. **You** will be entitled to an automatic **extended reporting period** for no additional premium. This extension is applicable to any **claim** made against **you** during the **policy period** and reported to **us** in writing, during the sixty (60) days immediately following the **policy termination date**.
2. **We** will provide an optional **extended reporting period** as described below:
  - a) If this **policy** is canceled, terminated or non-renewed, **you** shall have the right, upon payment of an additional premium, to an extension of the reporting period for any **claim** against **you** first made and reported after the date upon which the **policy period** ends, but only with respect to **wrongful acts** committed prior to the end of the **policy period** and otherwise covered by this **policy**. Such period shall be referred to as the optional **extended reporting period**.
    - 1) The available optional **extended reporting periods** and additional premium are determined in accordance with the rules, rates and rating plans **we** then have in effect in **your** state.
    - 2) **You** must request the optional **extended reporting period** in writing and must pay **us** the additional premium within 30 days following the date of such cancellation, termination or nonrenewal. If **we** do not receive **your** request and premium payment within 30 days following the date of such cancellation, termination or non-renewal, **your** right to purchase the optional **extended reporting period** shall cease.
    - 3) If **we** cancel for non-payment of premium, **you** may purchase the optional **extended reporting period** only after any earned premium due **us** is paid within 10 days after the date of cancellation or **policy** expiration, whichever comes first.
  - b) All premiums paid for an optional **extended reporting period** shall be deemed fully earned as of the first day of the optional **extended reporting period**. The optional **extended reporting period** may not be canceled.
  - c) The optional **extended reporting period** shall not increase any limits of liability stated in Item 3. of the Declarations page. For the purpose of **policy** limits, the reporting periods are part of, not in addition to, the **policy period**.

#### G. DUTIES IN THE EVENT OF CLAIM(S) OR POTENTIAL CLAIM(S)

1. If **you** receive a **claim**, **you** and any other involved **insured(s)** must see to it that **we** receive written notice of the **claim**, with full details including the date received, as soon as practicable, but in no event later than 90 days after such **claim** is first made.

2. **You** and any other involved **insured** must:
  - a) Immediately send us copies of any demands, notices, summonses or legal papers received in connection with the **claim**;
  - b) Authorize **us** to obtain records and other information;
  - c) Cooperate with **us** in the investigation, defense or settlement of the **claim**; and
  - d) Assist **us**, upon our request, in the enforcement of any right against any person or entity which may be liable to **you** because of damages to which this insurance may apply.
3. No **insured** will, except at that **insured's** own cost, voluntarily make a payment, assume any obligation, agree to a settlement or incur any expense related to a **claim** without **our** consent.
4. If during the policy period, **you** become aware of a **wrongful act** or any facts or other circumstance that occurred on or after the retroactive date but prior to the end of the **policy period**, which may reasonably be expected to subsequently give rise to a claim against **you**, **you** must give **us** written notice as soon as practicable, but in any event not later than the end of the **policy period** or any **extended reporting period**, if applicable. To the extent possible notice should include:
  - a) Where the **wrongful act** took place and any facts or circumstance concerning the wrongful act; and
  - b) The names and addresses of any persons and entities involved.
5. Any **claim** arising out of the **wrongful act**, facts or circumstance which is subsequently made against **you** shall be deemed to have been first made at the time **we** received such written notice from **you**, if we receive proper notice of the **potential claim** according to paragraph 4. above.

The date of mailing shall constitute the date that such notice was given and proof of mailing shall be sufficient proof of notice.

## H. CONDITIONS

### 1. CANCELLATION AND NON RENEWAL

- a) **We** may not cancel this **policy** except for failure to pay premium when due, in which case we will give 10 days written notice to the **named insured** before such cancellation is effective.
- b) The **named insured** may cancel this **policy** for itself and all other **insureds** by written notice to **us** stating when thereafter the cancellation shall be effective. If the **named insured** cancels, **we** will return 90% of the pro rata unearned premium, rounded to the next higher whole dollar within 15 days of the effective date of cancellation.
- c) **We** are not required to renew this **policy**. However, written notice of **our** intent to non-renew this **policy** shall be sent to the **named insured** at least 60 days prior to expiration of the **policy period**.
- d) Notices of cancellation or nonrenewal shall be sent by first class mail to the last address known to **us** with a statement of the specific reasons for cancellation or nonrenewal.
- e) If **we** decide to offer renewal terms, notice will be mailed by first class mail, at least 45 days prior to the expiration of the **policy** to the **named insured**. Failure to make the required premium payment by the renewal date will result in termination of the **policy** for nonpayment of premium.
- f) If **we** fail to provide at least 45 days notice of nonrenewal or changes in the terms and conditions of this **policy**, coverage will remain in effect until 45 days after notice is given or until the effective date of replacement coverage you obtain, whichever occurs first. Any earned premium for the extension of the terminated **policy** will be calculated pro rata based on the expiring premium or the rate filing then in effect, whichever is lower.

### 2. REPRESENTATIONS AND APPLICATION

By accepting this **policy** you agree that:

- a) The statements in the Declarations are accurate and complete;
- b) Those statements are based on representations **you** made in **your** application for this insurance **policy**;
- c) The representations made in **your** application are the basis of this **policy** and are to be considered as incorporated into and constituting a part of this **policy**;
- d) Those representations are material to the acceptance of the risk **we** assumed under this **policy**;

- e) **We** have issued this **policy** in reliance upon the truth, accuracy and completeness of such representations;
- f) The application shall be interpreted as a separate application for coverage by each **insured**. No statement in the application, fact pertaining to or knowledge possessed by any **insured** shall be imputed to any other **insured** for the purpose of determining if coverage is available; and
- g) Statements in the application, facts pertaining to or knowledge possessed by the individual signing the application shall be imputed to the **named insured**.

### 3. LEGAL ACTION AGAINST US

No person or entity has a right under this **policy**:

- a) To join **us** as a party or otherwise bring **us** into a suit asking for **damages** from an **insured**; or
- b) To sue **us** on this **policy** unless all of its terms have been fully complied with.

A person or entity may sue **us** to recover on an agreed settlement or on a final judgment against an **insured**; but we will not be liable for **damages** that are not payable under the terms of this **policy** or that are in excess of the applicable limit of liability. An agreed settlement means a settlement and release of liability signed by **us**, the **insured** and the claimant or the claimant's legal representative.

### 4. CHANGE IN OWNERSHIP, CONTROL OR EXPOSURE

a) If during the **policy period**:

- 1) Another person or entity or group of persons or entities acquires more than 50 percent of the assets of the **named insured**; or
- 2) Another person or entity, or group of persons or entities, acquires an amount of the outstanding securities representing more than 50 percent of the voting power for the election of the **named insured's** directors or trustees; or
- 3) The **named insured** consolidates with or merges with another entity;  
**you** shall notify **us** of the change described in 1., 2., or 3. above, herein referred to as **transaction**, as soon as practicable, but not later than 30 days after the effective date of the **transaction** and provide such additional information as **we** require.

- b) If a **transaction** occurs, coverage under this **policy** shall continue until termination of the **policy period** but only with respect to **claims** and **potential claims** made for **wrongful acts** which took place prior to the transaction.
- c) If **you** fail to provide notice as described in 4.a. above, coverage provided to **you** under this **policy** shall terminate. We will send written notice 45 days in advance of the termination date.
- d) In the event of a **transaction**, the **named insured** will have the right to an extension of coverage under the **policy** for a **claim** first made and reported during the 12 months after the **transaction** but, only with respect to any **wrongful act** occurring prior to the **transaction** and otherwise covered by this **policy**. The 12 month period shall be referred to as the run-off period.
  - 1) The premium means the premium in effect immediately prior to the **transaction**.
  - 2) The rights contained in paragraph 4. shall terminate unless written notice of the election and the additional premium due is received by **us** within 60 days of the **transaction**.
- e) In the event of a **transaction**, the **named insured** has the right to purchase the run-off period but, has no right to purchase the optional **extended reporting period** described in section F. of the **policy**.
- f) The additional premium for the run-off period shall be fully earned at the inception of the run-off period. The run-off period is not cancelable.
- g) The limit of liability for the run-off period is part of and not in addition to the limit of liability in Item 3. of the Declarations page.

### 5. TRANSFER OF RIGHTS OF RECOVERY AGAINST OTHERS TO US

If **you** have rights to recover all or part of any payment **we** have made under this **policy**, these rights are transferred to **us**. **You** must do nothing after a **loss** to impair our rights to seek or obtain recovery from others. At **our** request, **you** will sue those responsible or transfer those rights to **us** and help **us** enforce them. In the event of any payment under this **policy**, we shall be subrogated to the extent of such payment to all of **your** rights of recovery. **You** shall execute and deliver such instruments and papers and

do whatever else is necessary to secure such rights and shall do nothing to prejudice or compromise such rights without our express written consent.

#### 6. ASSIGNMENT

No change in, modification of or assignment of interest in this **policy** shall be effective except when made by a written endorsement to the **policy**.

#### 7. SOLE AGENT FOR THE INSURED

By accepting this **policy**, you agree that only the **named insured** is authorized to act on behalf of all **insureds** with respect to the following: consenting to settlement or releasing rights under this **policy**, payment for premiums and deductibles, receiving return premiums, giving or receiving notice of cancellation or nonrenewal, requesting any optional **extended reporting period** or run-off period and agreeing to any changes in this insurance **policy**. Each **insured** agrees that the **named insured** shall act on its or their behalf with respect to such matters.

#### 8. COVERAGE TERRITORY AND VALUATION

- a) This **policy** applies to a **wrongful act** committed anywhere in the world provided that the **claim** is made and suit is brought against the **insured** within the United States, its territories or possessions or Canada.
- b) All premiums, limits, deductibles, **loss** and other amounts are expressed and payable in the currency of the United States of America. If a judgment is rendered, a settlement is denominated or another element of **loss** under this **policy** is stated in a currency other than the United States of America dollars, payment under this **policy** shall be made in United States of America dollar equivalent determined by the rate of exchange published in the *Wall Street Journal* on the date the judgment becomes final, the amount of the settlement is agreed upon or any element of **loss** is due, respectively.

#### 9. OTHER INSURANCE

- a) If other valid and collectible insurance is available to you for **loss** covered under this **policy**, the insurance provided by this **policy** shall be excess over such other insurance, regardless of whether or not such insurance is primary, contributory, excess, contingent or otherwise.
- b) When this insurance is excess we have no duty to defend you against any **claim** if any other insurer has a duty to defend you against the **claim**. If no other insurer defends we will undertake to do so but we will be entitled to your rights against those other insurers.
- c) When this insurance is excess over other insurance we will pay only our share of the amount of **loss**, if any, that exceeds the sum of:
  - 1) The total amount that all such other insurance would pay for the **loss** in the absence of this insurance;
  - 2) The total of all deductibles, self-insurance and retentions under all that other insurance.

We will share the remaining **loss**, if any, with any other insurance that is not described in this provision and was not bought specifically to apply in excess of the limit of liability shown in the Declarations page of this **policy**.

#### 10. TWO OR MORE POLICIES, COVERAGE PARTS, OR ENDORSEMENTS ISSUED BY US

It is our stated intention that this **policy** and any other **policy**, coverage part or endorsement issued by us, or by another member of the **company**, shall not provide duplication or overlap of coverage for the same **claim**. If this **policy** and any other **policy** issued by us, or by another member of the **company**, to you, apply to the same **claim** then, Condition 9. Other Insurance notwithstanding:

- a) We shall not be liable under this **policy** for a greater proportion of the **loss** than the applicable limit of liability of this **policy** bears to the sum of the total limits of liability of all such policies; and
- b) The maximum amount payable under all such policies combined shall not exceed the highest applicable limit of liability under any one **policy**.

#### 11. ALLOCATION

If you incur both **loss** covered by this **policy** and **loss** not covered by this **policy** on account of any **claim** because such **claim** includes both covered and non-covered matters, coverage with respect to such **claim** shall apply as follows:

- a) 100 percent of **defense expenses** on account of the **claim** will be considered covered **loss**; and

b) **We** shall fairly allocate all remaining **loss** that you incurred on account of such **claim** between covered **loss** and non-covered **loss**.

**12. SEPARATION OF INSURED**

Except with respect to the limits of liability, deductible and any rights or obligations assigned to the first **named insured**, this insurance applies:

- a) As if each **insured** were the only **insured**; and
- b) Separately to each **insured** against whom a **claim** is made.

**13. CONFORMANCE TO STATUTE**

The terms of this **policy** which are in conflict with the statutes of the state in which this **policy** is issued are amended to conform to those statutes.

**14. SECTION TITLES**

The titling of sections and paragraphs within this **policy** is for convenience only and shall not be interpreted as a term or condition of this **policy**.

**15. BANKRUPTCY**

**You** or **your** estate's bankruptcy or insolvency does not relieve **us** of **our** obligations under this **policy**.

**16. LIBERALIZATION**

If **we** adopt any revisions to the terms and conditions of this **policy** form to provide more coverage without an additional premium charge during the **policy** term, the broadened coverage will immediately apply. However, the broadened terms and conditions will not apply to any **claims** that were first made against **you** prior to the effective date of the revision.

## **NOTICE TO FLORIDA INSUREDS**

### **Miscellaneous Professional Liability Insurance Claims – Made Notice**

**This policy is a CLAIMS-MADE AND REPORTED policy. Subject to the terms, conditions, exclusions and limitations of this policy, coverage is limited to liability for only those claims that are first made against you and reported to us in writing after the retroactive date and during the policy period or any optional extended reporting period, if exercised by you.**

**Unless otherwise endorsed, this is a “defense within limits” policy with claim expenses included within the Limit of Liability. The Limit of Liability available to pay damages will be reduced by amounts we pay for claim expenses as defined in the policy. Further note that amounts incurred for claim expenses and damages are subject to the deductible. Please read this policy carefully.**

## FLORIDA ACCEPTANCE OF APPLICATION(S) ENDORSEMENT

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company.

This endorsement, effective 12:01 A.M. 09/01/2015 modifies the following:

**SECTION H – CONDITIONS**, Paragraph **2. Representations and Application** is amended to add the following:

For the purposes of coverage afforded by this **policy**:

Application(s) shall mean the written insurance application(s) attached to the **policy** for the insurance coverage provided by this **policy** and incorporates any written statements and materials attached to the **policy** in conjunction therewith.

It is agreed by the **insureds** that the Declarations and statements in the application(s) are material and that this **policy** is issued in reliance upon the truth and accuracy of such Representations and statements.

All other terms and conditions remain unchanged.

## CHANGE OF NAME OR ADDRESS ENDORSEMENT

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company.

This endorsement, effective 12:01 A.M. 09/01/2015 modifies the following:

**Item 1.** of the Declarations page is deleted and replaced with the following:

**Item 1.** Named Insured and Address:

ED SCHLITT, LLC DBA COLDWELL BANKER ED SCHLITT REALTORS;  
SCHLITT PROPERTY MANAGEMENT, INC.

All other terms and conditions remain unchanged.

## CONSENT TO SETTLE AMENDMENT ENDORSEMENT

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company.

This endorsement, Effective 12:01 A.M. 09/01/2015 modifies the following:

**SECTION B. – DEFENSE AND SETTLEMENT (INCLUDED IN THE LIMIT)**, third Paragraph, is replaced with the following:

**We** will not settle a **claim** without the consent of the **named insured**. If the **named insured** refuses to consent to a settlement of any claim **we** recommend and which a claimant would accept, subject to the applicable limit of liability and deductible then **our** liability for the **claim** is limited to:

1. What **we** would have contributed to the settlement if **you** had consented to the settlement, including **claim expenses** incurred up to the date of such refusal; and
2. 70 percent of such **damages** in excess of the amount for which the **claim** could have been settled.

After the time of the **named insured's** refusal, the **named insured** shall be responsible for all **loss** in excess of the amount for which the **claim** could have been settled, the percentage of **damages** noted above in 2., and all **claims expenses**, incurred thereafter. For the purpose of this section, settlement includes but is not limited to any resolution of a **claim** that would have occurred as a result of any court-ordered process which the **named insured** chose not to accept.

All other terms and conditions remain unchanged.

## CONSENT TO SPECIFIC LEGAL COUNSEL ENDORSEMENT

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company.

This endorsement, Effective 12:01 A.M. 09/01/2015 modifies the following:

**SECTION G. - DUTIES IN THE EVENT OF CLAIM(S) OR POTENTIAL CLAIM(S)** is amended to add the following:

6. In the event an **insured** reports a **claim** to **us** in writing or a **potential claim**, **we** consent to the use of the law firm of TRIEBSCH & FRAMPTON (300 NORTH PALM ST, TURLOCK, CA 95380) FOR THE AGREED UPON RATE OF \$220 PER HOUR to defend such **claim**. The **insured** agrees that **our** consent is subject to the law firm's agreement to comply with **our** Litigation Management Guidelines and all of **our** other applicable claims legal guidelines in effect with **us**.

All other terms and conditions remain unchanged.

# RETROACTIVE DATES FOR SPLIT LIMITS OF LIABILITY ENDORSEMENT

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company.

This endorsement, Effective 12:01 A.M. 09/01/2015 modifies the following:

## POLICY DECLARATIONS

**Item 3. LIMIT OF LIABILITY** and **Item 5. RETROACTIVE DATE** are replaced with the following:

### Item 3. LIMIT OF LIABILITY:

- |  |  |
|--|--|
| <b>1. First Limit of Liability</b><br><i>(subject to the First Retroactive Date scheduled below)</i>   | <b>a. \$ <u>1,000,000</u> for each Claim; not to exceed</b><br><b>b. \$ <u>1,000,000</u> for all Claims in the aggregate</b> |
| <b>2. Second Limit of Liability</b><br><i>(subject to the Second Retroactive Date scheduled below)</i> | <b>a. \$ <u>0</u> for each Claim; not to exceed</b><br><b>b. \$ <u>1,000,000</u> for all Claims in the aggregate</b>         |

### Item 5. RETROACTIVE DATE:

- 1. First Retroactive Date:** 4/4/1994
- 2. Second Retroactive Date:** 9/1/2011

All other terms and conditions remain unchanged.

## ADDITIONAL INSURED ENDORSEMENT

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company.

This endorsement, Effective 12:01 A.M. 09/01/2015 modifies the following:

The following is added to **SECTION D – DEFINITIONS**, the definition of **Insured**:

**Insured** also means the entities listed in the schedule of additional **insureds** but only while rendering **professional services** at the request of the **named insured**, in support of the **named insured's** rendering of **professional services** to its clients; however, no coverage is afforded under this **policy** for any **claims** arising from any **wrongful act** in the rendering of or failing to render **professional services** by any **insured** covered under this endorsement that occurred prior to the retroactive date listed opposite the entity listed in the schedule of additional **insureds**.

**Schedule of additional insureds to which this endorsement applies:**

Entity(ies)	Retroactive Date
ED SCHLITT, LLC & SCHLITT PROPERTY MANAGEMENT, INC. DBA COLDWELL BANKER PARADISE HOYT MURPHY REALTORS -	6/4/12
ED SCHLITT, LLC & SCHLITT PROPERTY MANAGEMENT, INC. DBA COLDWELL BANKER PARADISE ED SCHLITT REALTORS	6/4/12
HC MURPHY INTERNATIONAL REFERRAL, INC.	6/4/12
ED SCHLITT & SCHLITT PROPERTY MANAGEMENT, INC. DBA COLDWELL BANKER PARADISE	9/1/1983

All other terms and conditions remain unchanged.



**NOTICE TO POLICYHOLDERS:  
MISCELLANEOUS PROFESSIONAL LIABILITY INSURANCE**

**INFORMATION REGARDING EXTENDED  
REPORTING PERIOD ENDORSEMENT  
("ERP COVERAGE")**

The enclosed policy provides coverage for claims reported during the policy period. Subject to the policy's terms and conditions, you may purchase an Extended Reporting Period Endorsement, also known as "ERP coverage", that will extend the time for reporting claims arising out of professional services rendered while the policy was still in effect, although the policy may have been cancelled, nonrenewed, or terminated. Please refer to Section F. of your policy for the terms and conditions for eligibility, purchasing or obtaining an Extended Reporting Period endorsement. There is a limited time for requesting such an endorsement.

The premium charged for the endorsement is expressed as a percentage of your policy's annual premium.

<b><i>Length of "ERP Coverage" Offered</i></b>	<b><i>"ERP Coverage" Premium</i></b>
12 months	100 % of expiring annual premium
24 months	150 % of expiring annual premium
36 months	200 % of expiring annual premium

*\*Extended Reporting Period Endorsements may be subject to state regulatory requirements.*

Please contact your agent or customer service representative for pricing specific to your situation and location.

# FLORIDA BODILY INJURY OR PROPERTY DAMAGE ENDORSEMENT WITH COMMERCIAL GENERAL LIABILITY INSURANCE

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company.

This endorsement, Effective 12:01 A.M. 09/01/2015 modifies the following:

**SECTION E –EXCLUSIONS**, Paragraph **4.** is replaced by the following:

4. Arising out of **bodily injury** or **property damage**; however, this exclusion does not apply to any **claim** arising out of a **wrongful act** committed by an **insured** in the rendering of **professional services** as specified in Item **6.** of the Declarations, and as a condition precedent to coverage, **you** agree to obtain and maintain, during the **policy period**, commercial general liability insurance with a minimum limit of liability of \$ 1,000,000.

All other terms and conditions remain unchanged.

# FLORIDA ENVIRONMENTAL HAZARDS ENDORSEMENT

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company.

This endorsement, Effective 12:01 A.M. 09/01/2015 modifies the following:

**SECTION E – EXCLUSIONS**, Paragraph **17.** is replaced by the following:

**17.** Arising out of:

- a) The actual, alleged or threatened discharge, dispersal, seepage, migration, release or escape of **pollutants** at any time;
- b) Any directive, request or voluntary decision that any **insured** monitor, clean up, remove, contain, treat, detoxify or neutralize pollutants; or
- c) Any governmental or regulatory directive to request to test for, monitor, clean up, remove, contain, treat, detoxify or neutralize pollutants; or
- d) The failure to discover, disclose, report or advise of the existence or amount of **pollutants**.

However, **we** will pay on **your** behalf **damages** and **claim expenses** incurred in the responding to a claim made against **you** and reported to **us** in writing during the **policy period**, or **extended reporting period**, if applicable, that arise from the failure to disclose, report, or advise of the existence of **pollutants**.

Notwithstanding anything to the contrary in the **policy**, including any endorsements thereto:

**Our** aggregate Limit of Liability for **damages** and **claim expenses** for all environmental hazard **claims** covered under this endorsement is \$1,000,000 (or the applicable aggregate Limit of Liability, set forth in Item **3. b.** of the Declarations, whichever is less) which amount will be included within, and not in addition to, the aggregate Limit of Liability set forth in **Item 3. b.** of the Declarations.

All other terms and conditions remain unchanged.

## INDEPENDENT CONTRACTOR ENDORSEMENT

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company.

This endorsement, Effective 12:01 A.M. 09/01/2015 modifies the following:

**SECTION D – DEFINITIONS**, under the definition of **Insured**, Paragraph **10**. is replaced by the following:

- 10.** An independent contractor for **claims** and **damages** under **Section A.1, 3. or 4.** but only while acting on behalf of any **insured**.

All other terms and conditions remain unchanged.

## LIMITED ADDITIONAL INSURED FRANCHISOR ENDORSEMENT

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company.

This endorsement, effective 12:01 A.M. 09/01/2015 modifies the following:

The following definition is added to **SECTION D – DEFINITIONS**:

**Limited additional insured** means a person or entity covered under this **policy** only with respect to **claims** made against such person or entity, which involve or arise from vicarious liability imposed due to any **wrongful act** of any **insured**.

In consideration of the premium charged, it is hereby understood and agreed that is a **limited additional insured**. No coverage is afforded to for any **claim** alleging or in any way involving any independent **wrongful act**, error or omission of .

It is understood and agreed that **we** assume no obligation to defend against such **claims** nor will **we** pay **claim expenses** in connection with such **claims**. **We** will pay **damages** only, to the extent that is held liable for an **insured's wrongful acts**.

All other terms and conditions remain unchanged.

## REAL ESTATE APPRAISER ENDORSEMENT

THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.

Named Insured: ED SCHLITT, LLC

Policy Number: LHR 9262295 04

Issued by The Hanover Insurance Company

This endorsement, Effective 12:01 A.M. 09/01/2015 modifies the following:

The following is added to **SECTION E - EXCLUSIONS – WHAT THIS POLICY DOES NOT INSURE:**

This **policy** does not apply to **claim(s)**:

Based upon or arising out of:

- a) The failure of investments to perform as expected or desired;
- b) Making of guarantees or warranties of potential sales, earnings, profitability, or economic value;
- c) Any warranties, or guarantees made by the **insured** as to the current or future value of any property;
- d) Any warranties or guarantees as to the suitability of the property for a specific use;
- e) The formation, syndication, operations or administration of any property syndication, or real estate investment to any form of corporation, general or limited partnership or joint venture formed for the purpose of investing in, selling or maintaining real property including those syndications, trusts, corporations, partnerships or joint ventures in which the **insured** has, had or intended to have a participating interest directly or indirectly in the profits or losses thereof; or
- f) The appraising of any property developed, constructed or owned by:
  - 1) An **insured** at that time of the **wrongful act** giving rise to such claims;
  - 2) Any entity in which the **insured** had, at the time of the **wrongful act** giving rise to the **claim**, a financial interest;
  - 3) Any entity which had, at the time of the **wrongful act** giving rise to the **claim**, a financial interest in the **named insured**;
  - 4) Any entity which at the time of the **wrongful act** giving rise to the **claim**, was under the same financial control as the **named insured**;
- g) Any professional services as an architect, engineer, property developer, builder, construction manager, loss control inspector, risk manager, safety inspector, insurance agent, insurance broker, mortgage banker, mortgage broker, title abstractor, and/or title agent.

All other terms and conditions remain unchanged.

THE ONLY SIGNATURES APPLICABLE TO THIS POLICY ARE THOSE REPRESENTING THE COMPANY NAMED ON THE FIRST PAGE OF THE DECLARATIONS.

**In Witness Whereof**, this company has caused this policy to be signed by its President and Secretary and countersigned on the declarations page, where required, by a duly authorized agent of the company.



Frederick H. Eppinger  
President



Charles Frederick Cronin  
Secretary



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

1/5/2016

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 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).

<b>PRODUCER</b> The Crockett Group, Inc. 3375 20th Street Suite 110 Vero Beach FL 32960	<b>CONTACT NAME:</b> Angela Ooley <b>PHONE (A/C, No, Ext):</b> (772) 562-9664 <b>E-MAIL ADDRESS:</b> angie@thecrockettgroup.com	<b>FAX (A/C, No):</b> (772) 562-9668	
	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>
<b>INSURED</b> Ed Schlitt, L.C., DBA: Coldwell Banker Commercial 1209 US Highway 1 Sebastian FL 32958	<b>INSURER A:</b> FCCI Insurance Group		10178
	<b>INSURER B:</b> Monroe Guaranty Insurance Company		
	<b>INSURER C:</b>		
	<b>INSURER D:</b>		
	<b>INSURER E:</b>		
<b>INSURER F:</b>			

**COVERAGES**      **CERTIFICATE NUMBER:** 2015-2016      **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 CERTIFICATION 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 WVP	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS
A	<input checked="" type="checkbox"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:	X	GL00161703	11/8/2015	11/8/2016	EACH OCCURRENCE \$ 1,000,000 DAMAGE TO RENTED PREMISES (Ea occurrence) \$ 100,000 MED EXP (Any one person) \$ 5,000 PERSONAL & ADV INJURY \$ 1,000,000 GENERAL AGGREGATE \$ 2,000,000 PRODUCTS - COMP/OP AGG \$ Included \$
B	<input checked="" type="checkbox"/> <b>AUTOMOBILE LIABILITY</b> <input checked="" type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS		CA00257003	11/8/2015	11/8/2016	COMBINED SINGLE LIMIT (Ea accident) \$ 1,000,000 BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ PIP-Basic \$ 10,000
A	<input checked="" type="checkbox"/> <b>UMBRELLA LIAB</b> <input checked="" type="checkbox"/> OCCUR <input type="checkbox"/> EXCESS LIAB <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input checked="" type="checkbox"/> RETENTION \$ 10,000		UMB00179123	11/8/2015	11/8/2016	EACH OCCURRENCE \$ 2,000,000 AGGREGATE \$ 2,000,000 \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N N/A				<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$

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

The certificate holder and its board members, officials, officers and employees are listed as additionally insured.

<b>CERTIFICATE HOLDER</b> joy.carey@cbparadise.com City of Fort Pierce Procurement Department 100 North US Highway #1 Fort Pierce, FL 34950	<b>CANCELLATION</b> 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 Helen Crockett/ASO
--	--

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# LLUXURY HOME COUNCIL

*Be it known by all here present that the  
Luxury Home Council has designated*

***Hoyt C. Murphy, Jr.***

***Accredited Luxury Home Specialist***

*signifying advanced educational requirements  
and expertise in the luxury home marketplace.*



*[Signature]*  
*Luxury Home Council Authorized Representative*

This certificate is the property of The Luxury Home Council and may be revoked upon termination of membership.

ACHIEVEMENT

# Realsource

*Presents this Benchmark Award to*

**HOYT C. MURPHY, JR.**

**Hoyt C. Murphy, Inc.**

*For Achieving Expert Status*

**Land Brokerage**

*January 31, 2003*

*Holt S. Mackay*

Holt S. Mackay

*Craig R. Rainey, CCIM*

Craig R. Rainey, CCIM





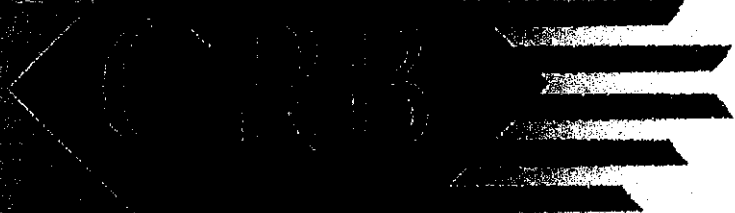
REAL ESTATE BROKERAGE  
MANAGERS COUNCIL

of the

REALTORS NATIONAL MARKETING INSTITUTE®  
A NATIONAL ASSOCIATION OF REALTORS® AFFILIATE

Presented by

**HOYT** **PHILIP JR.**



**CERTIFIED** **BROKERAGE**

*[Handwritten signature]*

DEPARTMENT OF REAL ESTATE **CERTIFICATE NO. 12100**

The Real Estate Brokerage Managers Council



# REALTORS® LAND INSTITUTE

An Affiliate of the National Association of REALTORS®

Course Provider: RLI Florida Chapter/GTAR

This Certificate of Course Completion is awarded to:

**Hoyt C. Murphy, Jr.**

In recognition of outstanding accomplishment through the successful completion of the RLI Land University course:

## Site Selection

11/04-05/2008

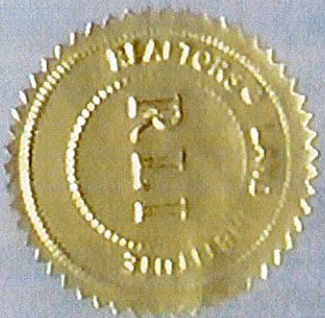
Contact Hours — 16

Keith Morris, ALC, ABR, CRB, CRS, GRI  
RLI 2009 President

December 15, 2008  
Date

Gloria Bowman  
RLI Executive Vice President

December 15, 2008  
Date



**Certified FHA 203k Renovation Specialist  
Continuing Education Certificate of Completion**

**Title:** FHA 203k Construction and Rehab Loan  
**Hours:** 3  
**Course Number:** 0012479  
**Course Type:** Continuing Education  
**Instructor:** Andrew Patrick Wood  
**Provider Number:** 0004882  
**Course Date:** 3.17.14  
**Location:** Realtors Association of St. Lucie

This is to certify that you have completed the **FHA 203k Construction and Rehab Loan** course on the above-mentioned date. You are hereby certified through the State of Florida for 3 hours of Continuing Education. This is also to confirm that your attendance form was sent to the State for processing. Please retain a copy of this certificate for your records.

Please contact the instructor if you have any questions, concerns or comments.

Andy Wood  
HUD Certified 203k Instructor  
State Certified for Continuing Education  
5010 W Carmen St.  
Suite 2150  
Tampa, FL 33609  
727.410.9663 (M)  
813.769.3911 (O)  
[awood@titanhl.com](mailto:awood@titanhl.com)

## Request for Taxpayer Identification Number and Certification

**Give Form to the  
requester. Do not  
send to the IRS.**

Print or type See Specific Instructions on page 2.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Ed Schlitt LC</b>		
	2 Business name/disregarded entity name, if different from above <b>DBA Coldwell Banker Paradise</b>		
	3 Check appropriate box for federal tax classification; check only one of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ <b>C</b> <small>Note. For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner.</small> <input type="checkbox"/> Other (see instructions) ▶		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
	5 Address (number, street, and apt. or suite no.) <b>1209 US Highway 1</b>		Requester's name and address (optional)
	6 City, state, and ZIP code <b>Sebastian, FL 32958</b>		
	7 List account number(s) here (optional)		

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

**Note.** If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

<b>Social security number</b>	
[ ] [ ] [ ] - [ ] [ ] - [ ] [ ] [ ]	or
<b>Employer identification number</b>	
6 5 - 0 8 8 1 9 8 9	

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

<b>Sign Here</b>	Signature of U.S. person ▶	Date ▶ 1/12/16
------------------	----------------------------	----------------

**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at [www.irs.gov/fw9](http://www.irs.gov/fw9).

**Purpose of Form**

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See *What is backup withholding?* on page 2.

By signing the filled-out form, you:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
- Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

2015 / 2016

**ST. LUCIE COUNTY LOCAL BUSINESS TAX RECEIPT**

RECEIPT # 1014426

CHRIS CRAFT, ST. LUCIE COUNTY TAX COLLECTOR

EXPIRES SEPTEMBER 30, 2016

FACILITIES OR MACHINES / ROOMS SEATS EMPLOYEES 5  
TYPE OF 6531 REAL ESTATE (Broker)  
BUSINESS

BUSINESS/ Steven Schlitt

DBA NAME Ed Schlitt LC Coldwell Banker Paradise  
MAILING Steven Schlitt  
ADDRESS 411 N US 1  
Fort Pierce, FL 34950

BUSINESS 411 N US 1  
LOCATION Fort Pierce, FL 34950  
City of Fort Pierce



RENEWAL ORIGINAL TAX \$15.10  
PENALTY  
COLLECTION COST  
TOTAL \$15.10

BK3010137

Paid 08/25/2015 15.10

0119-20150825-004112

Law requires this Local Business Tax Receipt to be displayed conspicuously at the place of business in such a manner that it can be open to the view of the public and subject to inspection by all duly authorized officers of the county. Upon failure to do so, the Local Business Taxpayer shall be subject to the payment of another Local Business Tax for the same business, profession, or occupation.

Pursuant to State Law, all Local Business Tax Receipts shall be sold by the Tax Collector beginning July 1st of each year and shall expire on September 30th of the succeeding year. Those Local Business Tax Receipts renewed beginning October 1st shall be delinquent and subject to a delinquency penalty of 10% for the month of October, plus an additional 5% penalty for each month of delinquency thereafter until paid; provided that the total delinquency penalty shall not exceed 25% of the Local Business Tax for the delinquent establishment.

In addition to the penalty, the Tax Collector shall be entitled to a collection cost fee of from \$1.00 to \$5.00, based on the amount of the Local Business Tax, which shall be collected from delinquent taxpayers after September 30th, of the business year.

This receipt is a Local Business Tax only. It does not permit the Local Business Taxpayer to violate any existing regulatory or zoning laws of the state, county or cities. It also does not exempt the Local Business Taxpayer from any other taxes, licenses or permits that may be required by law.

Local Business Taxes are subject to change according to law.

Steven Schlitt  
411 N US 1  
Fort Pierce, FL 34950

**ARTICLES OF ORGANIZATION**

**ED SCHLITT, L.C.**

**A FLORIDA LIMITED LIABILITY COMPANY**

**ARTICLE I - Names:**

The name of the Limited Liability Company is:

**ED SCHLITT, L.C.**

**ARTICLE II - Address:**

The mailing address and street address of the principal office of the Limited Liability Company is:

**ED SCHLITT, LC  
321 21st Street  
Vero Beach, Florida 32960**

**ARTICLE III - Duration:**

The period of duration for the Limited Liability Company shall be perpetual until it is dissolved and its affairs wound up in accordance with the regulations duly adopted by this Limited Liability Company and the Florida Statutes.

**ARTICLE IV - Management:**

The Limited Liability Company is to be managed by a manager or managers and the name and address of the managers are as follows: Steven R. Schlitt, P.O. Box 4182, Vero Beach, Florida, 32964 and Linda S. Gonzalez, 2195 47th Terrance, Vero Beach, Florida, 32966.

These managers are to serve as the managers of the Limited Liability Company until the first annual meeting of members or until their successor is elected and qualified.

98 DEC 17 PM 3:54  
SECRETARY OF STATE  
DIVISION OF CORPORATIONS

**ARTICLE V - Admission of Additional Members:**

There is no right given to the members to admit additional members.

**ARTICLE VI - Members Rights to Continue Business:**

The remaining members of this Limited Liability Company shall have the right to continue the business of the Limited Liability Company on the death, retirement, resignation, exclusion, bankruptcy, or dissolution of a member or the occurrence of any other event which terminates the continued membership of a member in the Limited Liability Company by unanimous written agreement executed by all remaining members of the Limited Liability Company.

**ARTICLE VII - Affidavit of Membership and Contributions**

The undersigned authorized representative of a member of Ed Schlitt, L.C., certifies:

- 1) the above named Limited Liability Company has at least two (2) members;
- 2) the total amount of cash contributed by the members is \$50,000.00;
- 3) if any, the agreed value of property other than cash contributed by members is \$50,000.00; The description of property is tangible personal property.
- 4) the total amount of cash and property contributed and anticipated to be contributed by member(s) is \$100,000.00.

ARTICLE VIII - Registered Agent

Charles E. Garris, whose street address is 817 Beachland Boulevard, Vero Beach, Florida 32963, is appointed as the initial Registered Agent in this State for this Limited Liability Company.

Dated this 14th day of December, 1998.

(In accordance with §608.408(3), Florida Statutes, the execution of this affidavit constitutes and affirmation under the penalties of perjury that the fact stated herein are true.)

*Steve R. Schlitt*

STEVEN R. SCHLITT

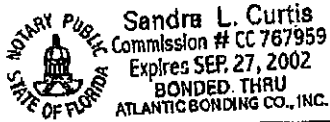
*Linda S. Gonzalez*  
LINDA S. GONZALEZ

STATE OF FLORIDA

COUNTY OF INDIAN RIVER

Acknowledged before me by STEVEN R. SCHLITT this 14th day of December 1998.

*Sandra L. Curtis*



(Print, type, or stamp commissioned name of notary public)

Personally known  or produced identification \_\_\_\_\_  
Type of identification produced \_\_\_\_\_

STATE OF FLORIDA

COUNTY OF INDIAN RIVER

Acknowledged before me by LINDA S. GONZALEZ, this 11<sup>th</sup> day of December

1998.

Sandra L. Curtis



Sandra L. Curtis  
Commission # CC 767959  
Expires SEP 27, 2002  
BONDED THRU  
ATLANTIC BONDING CO., INC.

(Print, type, or stamp commissioned  
name of notary public)

Personally known  or produced identification \_\_\_\_\_  
Type of identification produced \_\_\_\_\_

**CONSENT OF REGISTERED AGENT**

Having been named as Registered Agent for this Limited Liability Company at the registered office designated in the foregoing Articles of Organization, the undersigned is familiar with and accepts the obligations of this designation.

Dated this 11 day of December, 1998.

  
\_\_\_\_\_  
CHARLES E. GARRIS  
Registered Agent



**BID PROPOSAL RFP NO. 2016-012**

## PROPERTY OVERVIEW

### RFP REQUIREMENTS

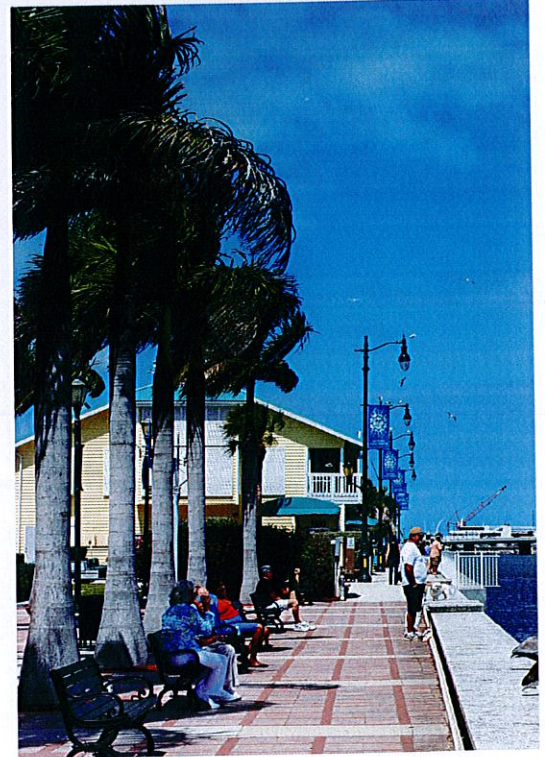
"The undersigned solemnly declares and certifies that the enclosed information are true and correct statements of the history, services, and abilities of Coldwell Banker Paradise. Further, it is agreed and understood that at the sole option of the City of Fort Pierce, any information which is found to be incorrect, incomplete, or misleading as to any matter relied upon in evaluation of proposals may constitute cause for termination of such contract." We use confidentiality agreements in the marketing of substantial residential and commercial properties.

### ABILITY TO MEET/EXCEED THE SCOPE OF SERVICES

Coldwell Banker Paradise is licensed by the State of Florida Department of Business and Professional Regulation to offer Brokerage services within state of Florida.

Coldwell Banker Paradise has ten offices covering Brevard, Indian River, St. Lucie and Martin Counties. We are also members of seven MLS boards, including the Realtors Association of the Palm Beaches, Indian River County, Brevard County, mid-Florida, and Ft. Lauderdale.

Coldwell Banker Paradise is a Global Company with vast network members who utilize our resources to provide the highest level of excellence through technology, training and a proven business model for growth and development.



### CREDENTIALS AND EXPERIENCE

Coldwell Banker Paradise has over 250 qualified associates and professional support staff. Many of our agents have over four decades of service to the local markets. Hampton Jackson and Hoyt "Pat" Murphy, Jr. are our project leaders. Hampton holds a FHA203K and Reverse Mortgage designation, and he has extensive experience with builders and developers. He has closed numerous transactions with financial institutions such as Wells Fargo and Iberia Banks.

Hoyt "Pat" Murphy, Jr. grew up in his family real estate business which was established in 1949 in Ft. Pierce. In 1984, Hoyt took over as President and CEO of Hoyt C. Murphy, Inc. Realtors which included more than 50 Sales Associates and four offices. During his reign as president, the company grew from grossing over \$25 Million annually to a high of over \$179 Million and gained the reputation of being the largest and oldest Real Estate brokerage firm in St. Lucie County. Since 1949 the firm has sold over \$1.5 Billion of local real estate transactions including groves, hotels, residences, condominiums and commercial properties.

In June of 2012, Hoyt C. Murphy, Inc. Realtors merged with Coldwell Banker Ed Schlitt Realtors to become Coldwell Banker Paradise, Hoyt Murphy Realtors, the leading residential and commercial brokerage on the Treasure Coast.

### COMPLIANCE WITH TERMS AND CONDITIONS

The RFP terms have been reviewed and accepted by Coldwell Banker Paradise Hoyt Murphy REALTORS®

1. The Exclusive Representation Agreement on each property listed with our company is our company in consideration for the services provided by Broker as set forth below, Client hereby appoints Broker as Client's exclusive agent and real estate advisor and grants Broker the exclusive right to represent Listing agent as stated in the Florida Association of Realtor Sales and Listing Agreements.

2. Broker's services will include but are not limited to the solicitation of potential Buyers, Multiple Listing Services, screening of potential clients and the use and cooperation of other licensed real estate brokers and agree to share the commission on the closed transactions as stated in the Florida Association of Realtor Sales and Listing Agreement.

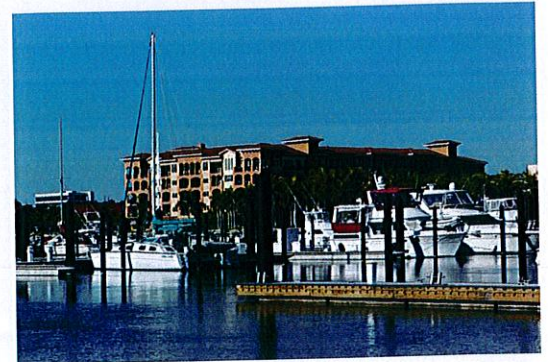


**BID PROPOSAL RFP NO. 2016-012**

## **EXECUTIVE SUMMARY**

### **SCOPE OF SERVICE**

It is the intent of this RFP to have the successful Broker enter into a Contract for professional services as outlined herein. The Broker will be paid strictly on a commission basis and will be expected to work closely with the City Manager, his designees and City staff. The respondents to this RFP must be knowledgeable of the local real estate market and should have experience in the sales and leasing of similar properties. The professional services required by the City in connection to this RFP covers the entire spectrum of those services customarily provided by commercial real estate brokers. In addition, if Coldwell Banker Paradise Hoyt Murphy REALTORS® is the awarded party of this RFP, staff assigned to this project will attend monthly CRA advisory board meetings and will bring necessary documentation to support our marketing efforts.



### **MARKET INFORMATION**

The commercial sector has seen substantial improvement in the last year. With the significant improvement in the residential sector for the past three years, we are now seeing commercial, industrial and office sales and leasing improving. A good example is the US 1 corridor in Ft. Pierce. Many of the retail and office properties that sat vacant for several years have been sold or leased. Several have undergone very substantial renovations. We expect 2016 to be an outstanding year for the commercial markets with low interest rates and available money from lenders allowing businesses to grow and expand.

### **MARKETING THE PROPERTY**

Coldwell Banker Paradise Hoyt Murphy Realtors has a unique marketing platform that allows us to easily market properties through a variety of mediums and to selected target audiences. The goal of the marketing plan is to quickly expose your property to the maximum number of qualified purchasers and cooperating brokers and to obtain the highest sales price, in the shortest amount of time. Our firm is the only locally based full service real estate company that can handle both commercial and residential assignments.

### **RECOMMENDATION**

We recommend that you partner with Coldwell Banker Paradise Hoyt Murphy REALTORS® to represent the City of Ft. Pierce in your desire to liquidate City assets, as we are a Real Estate Firm that has been locally based since 1949. Coldwell Banker Paradise Hoyt Murphy REALTORS® markets through Coldwell Banker Commercial and Coldwell Banker Residential. We are the leading broker in Ft. Pierce with the highest market penetration.

### **ABOUT COLDWELL BANKER PARADISE**

Coldwell Banker Paradise Hoyt Murphy REALTORS® is one of the most respected brokerage firms on the Treasure Coast. Over the years the firm has actively been involved in all facets of commercial and residential real estate, including the sale of some of the most recognizable properties on the Treasure Coast, including the 2300 acres that was developed into the PGA Reserve, the site for the Walmart Distribution Center, and recently the site for the Square Grouper Restaurant. Our firm has brokered over 200,000 acres of land.

### **ABOUT THE COLDWELL BANKER ORGANIZATION**

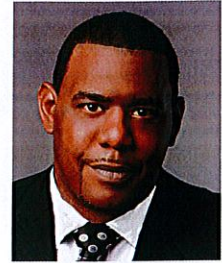
With a collaborative network of independently owned and operated affiliates, the Coldwell Banker organization has over 109 years of experience providing real estate service. We have a global presence of being represented in 44 countries, and 3,000 offices worldwide. We are number one because of how we represent your property to the world.



**REFERENCES**

"I have had the pleasure of working real estate transactions with Hampton Jackson, Realtor with Coldwell Banker Paradise Hoyt Murphy REALTORS® over the past several months. He has always been courteous and responsive as well as helpful when we have worked together. He is a valuable asset to the real estate community in our area and I truly appreciate our working business relationship thus far. I hope to continue to close deals with Mr. Jackson through this upcoming year. I know this will be very positive for both him and Adams Homes."

Kelle Dorsch, Home Site Analyst/Administrator  
Adams Homes - Melbourne Division



Hampton Jackson,  
REALTOR

"I would like to take this opportunity to thank you for all of your time, assistance, hard work and help in selling our homes that we are building. You and your entire team have imprinted a very professional impression on me since we first met. Your detailed work has helped us sell our properties much quicker than we expected. Also you are very considerate in working around our schedules. I look forward to working with you as we move forward with this project."

Mike Garofalo, Owner  
Suncor Properties

"I met Pat almost 20 years ago. Over this time I have had the privilege of having Pat guide me through several million dollars of buying and selling investment property. Pat's ability to navigate the real estate process plus his vast knowledge of the local market has proven, time and again, of the utmost value. His integrity and drive to make the "deal" right and fair for all concerned have become pillars upon which I trust. I could not imagine purchasing property in St Lucie county without the services of Pat Murphy."

John Stallings



Hoyt C. "Pat" Murphy, Jr.,  
REALTOR

"I am writing to you to express my sincere appreciation for the expert help and services provided by Mr. Hoyt C. Murphy, Jr. (Pat) in assisting us to locate, purchase and sell various commercial properties.

Mr. Murphy has helped us and our company in finding, purchasing and selling numerous commercial properties in the past ten years all along the Treasure Coast. Whenever we are in need of buying or selling a commercial property in the Treasure Coast area, Pat is always the first broker we contact. He has the professional expertise, connections and the local knowledge to always direct us to the suitable properties when buying, and get us the best price when selling. He is also always available to assist throughout the transaction process with his professional expertise. Most importantly, he shows the utmost integrity and honesty in all situations.

I greatly appreciate all the help and services Pat has provided. We cannot be any happier as a client."

John Sigler, Member, JIT Investment Company, LLC



PARADISE HOYT MURPHY REALTORS

BID PROPOSAL RFP NO. 2016-012

COST OF SERVICES

**Cost of Residential Services**

10% Under \$40k

6%



**Cost of Commercial Services**

6% On the first portion up to \$500,000

5% On the portion between \$500,000 to \$1 Million

4% On that portion over \$1 Million

**Cost of Commercial Leasing Services**

10% On Leases valued at less than \$20,000

6% On Leases valued above \$20,000

*[Handwritten Signature]*  
\_\_\_\_\_  
Broker Signature

January 5, 2016



CITY OF FORT PIERCE  
REAL ESTATE BROKER SERVICES

RFP NO. 2016-012

ADDENDUM NO. 1

The purpose of this addendum is to provide modifications and clarifications to the specification as follows:

Section V – *Statement of Work, Proposer’s Questionnaire*, item numbered 7. , has been modified and should read:

7. Proposer sale & lease history for properties? Include the following information:

Date	Commercial Sq. ft.	Location	Sale Price	Annual Lease	Listing Date

All other conditions of this bid remain the same.

Please acknowledge receipt of this addendum and include it with your submittal.

Signature:   
Mantua

Signature: Linda Gonzalez  
Typed or Printed

Company Name: Coldwell Banker Paradise Hoyt Murphy Realtors

Address: 411 North US Highway 1 Fort Pierce, Florida, 34950

Date: January 11, 2016

/gc

See Attached

**January 5, 2016**



**CITY OF FORT PIERCE**  
**REAL ESTATE BROKER SERVICES**

**RFP NO. 2016-012**

**ADDENDUM NO. 2**

PLEASE disregard Addendum No. 1 due to the omission of the phrase "history of commercial properties".

The purpose of this addendum is to provide modifications and clarifications to the specification as follows:

Section V – *Statement of Work, Proposer’s Questionnaire*, item numbered 7. , has been modified and should read:

7. Proposer sale & lease history of commercial properties? Include the following information:

Date	Commercial Sq. ft.	Location	Sale Price	Annual Lease	Listing Date

All other conditions of this bid remain the same.

Please acknowledge receipt of this addendum and include it with your submittal.

Signature:   
Manual

Signature: Linda Gonzalez  
Typed or Printed

Company Name: Coldwell Banker Paradise Hoyt Murphy Realtors

Address: 411 North US Highway I Fort Pierce, Florida, 34950

Date: January 11, 2016

/gc

See Attached



**Certification Statement  
Local Vendor Preference**

I certify that my company meets all of the following qualifications to be eligible for the local vendor preference:

- 1) That my company has a fixed, staffed office or distribution point located in and having a street address within St. Lucie, Indian River, Martin or Okeechobee City for at least one year prior to the issuance of the request for competitive bids or request for proposals by St. Lucie City; and
- 2) That my company holds any business or Broker license required by St. Lucie City and/or can document payment of business license taxes in St. Lucie City;
- 3) That my company is principal offeror who is single offeror; a business which is the prime Broker and not a subBroker; or a partner or joint venturer submitting an offer in conjunction with other businesses.
- 4) Attached is a copy of a business or Broker license and/or business tax receipt for St. Lucie City, Indian River, Martin or Okeechobee Counties to verify that I have been in business at least one year prior to the issuance of the Request for Bid or Proposal.

Company Name: Coldwell Banker Paradise Hoyt Murphy Realtors

Address: 411 North US Highway 1 Fort Pierce, Florida, 34950

Business or Broker License Number: BK 3007542

Phone Number: (772)461-3250 Fax Number: (772)460-2067

Owner's Name: Linda Gonzalez

Signature: *[Handwritten Signature]*



Sworn to before me this 5 day of September, 2016

Notary Public for the State of Florida My Commission Expires NOV 5 2019

Notary Public Signature: *[Handwritten Signature]* Printed Name: Margaret A. Murphy

**FOR PROCURMENT OFFICE ONLY ~ DO NOT COMPLETE BELOW**

To be verified and completed by an authorized representative from the City of Fort Pierce Purchasing Department:

Vendor Certified by: \_\_\_\_\_ Date: \_\_\_\_\_  
(Authorized Signature)

To be approved as a local bidder and receive bid preference on an eligible local project, this certification and a copy of your local business or Broker license must be submitted with your bonafide Bid/RFP package.



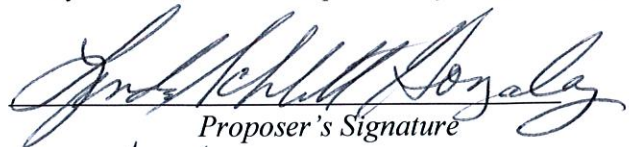
# DRUG-FREE WORK PLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certified that

Coldwell Banker Paradise Hoyt Murphy Realtors does:  
*(Name of Business)*

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business=s policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or Agreemental services that are proposed a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or Agreemental services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee=s community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

  
*Proposer's Signature*

1/2/16  
*Date*




# CITY OF FORT PIERCE PROPOSER'S CHECKLIST

This checklist is provided to assist each Proposer in the preparation of their proposal response. Included in this checklist are important requirements, which is the responsibility of each Proposer to submit with their response in order to make their response fully compliant. This checklist is only a guideline~ it is the responsibility of each Proposer to read and comply with the Request for Proposal in its entirety.

Check "Yes" or "No" to each of the following:

	YES	NO
Is Request for Proposal cover page (page 1) completed, signed and attached?	<u>X</u>	_____
All prices have been reviewed for mathematical accuracy, all price corrections initialed, and all price extensions and totals thoroughly checked.	<u>X</u>	_____
Include proof of proper licensing as stated in proposal documents.	<u>X</u>	_____
Include proof of proper insurance as stated in proposal documents.	<u>X</u>	_____
Proposal envelope is marked accordingly.	<u>X</u>	_____
Is Drug-Free Work Place form signed and enclosed?	<u>X</u>	_____
W-9 Form completed, signed and attached?	<u>X</u>	_____
Are six (6, one original and five copies) complete proposal packages and one electronic (PDF) on a USB Flash Drive included?	<u>X</u>	_____

PLEASE SIGN AND RETURN WITH PROPOSAL

<b>DELIVER TO:</b> City of Fort Pierce 100 North U.S. #1 Fort Pierce, FL 34950  <b>MAIL TO:</b> City of Fort Pierce Procurement Dept. P.O. Box 1480 Fort Pierce, FL 34954-1480	<b>REQUEST          FOR          PROPOSALS          and          PROPOSER          ACKNOWLEDGMENT</b>
<b>Contact: Gelencia Carter, 772-467-3748</b>	<b>RFP No: 2016-012</b>
<b>Mandatory Pre-Bid Conference Date:</b> N/A	<b>RFP Title: REAL ESTATE          BROKER SERVICES</b>
<b>Mandatory Pre-Bid Location:</b> N/A	<b>RFP Opening Location:</b> City of Ft. Pierce Procurement Dept. 100 North U.S. #1, 1st Floor Ft. Pierce, Florida 34950
<b>RFP Due Date &amp; Time:</b> 3:00 PM, TUESDAY, JANUARY 12, 2016	If you need any reasonable accommodation for any type of disability in order to participate in this procurement, please contact this department as soon as possible.
<b>Proposer Name:</b> FLEISCHMAN REALTY GROUP, LLC -----  <b>Mailing Address:</b> 220 ORANGE AVENUE ----- ----- -----	<i>I hereby certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this proposal for the proposer.</i>   X _____ Authorized Signature (Manual)
<b>City, State, Zip Code:</b> FORT PIERCE, FL 34950	<b>Typed or Printed Name:</b> LAURA FLEISCHMAN
<b>Type of Entity (Circle One):</b> Corporation Partnership Proprietorship	<b>Title:</b> BROKER
<b>Incorporated in the State of:</b> FL <b>Year:</b> 2009	<b>Delivery in _____ days, ARO</b>
<b>Phone Number:</b> 772-905-8702	<b>Payment Terms:</b> Net 30 Days
<b>Fax Number:</b> 772-905-4900	<b>FEIN or SS Number:</b> 27-0914025
<b>E-Mail Address:</b> laurafleischman@gmail.com	<b>Local Business:</b> <input checked="" type="checkbox"/> Y <input type="checkbox"/> N <b>MWBE:</b> <input checked="" type="checkbox"/> Y <input type="checkbox"/> N
<b>Bid Security is attached, when required, in the amount of \$ _____</b> <b>F.O.B. DESTINATION</b>	<b>If returning as a "No Bid" state reason:</b>
<b>THIS PAGE MUST BE COMPLETED AND RETURNED WITH YOUR BID</b>	



## PROPOSER'S QUESTIONNAIRE

RFP #2016-012

Real Estate Broker Services

It is understood and agreed that the following information is to be used by the City of Fort Pierce to determine the qualifications of Proposers to perform the work required. The Proposer waives any claim against the City that might arise with respect to any decision concerning the qualifications of the Proposer.

The undersigned attests to the truth and accuracy of all statements made on this questionnaire. Also, the undersigned hereby authorizes any public official, person, firm or corporation to furnish the City of Fort Pierce any pertinent information requested by the City deemed necessary to vary the information on this questionnaire.

**Dated this 12<sup>th</sup> day of JANUARY, 2016.**

**FLEISCHMAN REALTY GROUP, LLC**

**Name of Organization / Proposer**

**By: LAURA FLEISCHMAN, BROKER/OWNER**

**Name and Title**

(If more space is needed, please attach additional sheets.)

1. Corporation, Partnership, Joint Venture, Individual or other?  
**LLC**

2. Firm's name and main office address, telephone and fax number, e-mail:

**FLEISCHMAN REALTY GROUP, LLC**

**220 ORANGE AVE**

**FORT PIERCE, FLORIDA 34950**

3. Give the names of the person who will be authorized to make decisions and speak as a representative of the Proposer, their titles, addresses and telephone and facsimile numbers.

**LAURA FLEISCHMAN, BROKER**

**KENT FLEISCHMAN, SALES AGENT**

**KENT FLEISCHMAN, JR, SALES AGENT**

4. Firm's previous names (if any).

**NONE**

5. How many years has your organization or individual been in commercial real estate business and locations?

**ORGANIZATION:**

Years: **7 YEARS** Location(s): **FORT PIERCE, PORT ST. LUCIE**

**INDIVIDUAL:**

Years: **25 YEARS** Location(s): **FORT PIERCE, PORT ST. LUCIE, MIAMI, NEW JERSEY, NEW YORK**

Licenses: **FLORIDA REAL ESTATE BROKER  
FLORIDA REAL ESTATE CORPORATION  
FORT PIERCE BUSINESS LICENSE**

Certifications: **FLORIDA MINORITY, WOMEN BUSINESS CERTIFICATION  
CERTIFIED DISTRESSED PROPERTY EXPERT  
NATIONAL ASSOCIATION OF REALTORS MEMBER  
INTERNATIONAL CONSORTIUM OF REAL ESTATE ASSOC.**

6. Names of personnel (if other than Proposer) that will be performing requested realtor services/work:

**KENT FLEISCHMAN REALTOR  
KENT FLEISCHMAN, JR, REALTOR**

7. Proposer sale & lease history of commercial property? Include the following information:

<u>Date</u>	<u>Commercial Sq ft</u>	<u>Location</u>	<u>Sale price</u>	<u>Annual lease</u>	<u>Listing Date</u>
3/9/11	(3) 3acre lots	2790 Gentile Rd Fort Pierce,	\$147,000		11/5/2011
2/5/11	4188	2100 NW Courtyard Cir Port St. Lucie		\$108,000	
2/8/12	23,756	529 NW Prima Vista Blvd. Port St. Lucie	\$1,725,000		6/2011
8/7/12	11,661	625 S US Hwy 1 Fort Pierce	\$ 230,000		2/2012
8/22/12	4658	1156 S Ocean Drive Fort Pierce	\$ 455,000		12/23/2013
8/7/14	3968	1144 S Ocean Drive Fort Pierce	\$ 405,000		3/28/2014
12/1/15	SUITES	201 S 2 <sup>ND</sup> ST		various	12/1/15

8. List training/education of Proposer and Proposer staff that will be assigned to this project:

**FLORIDA REAL ESTATE LICENSE  
FLORIDA REAL ESTATE BROKER  
FLORIDA COMMUNITY MANAGER  
VARIOUS ONLINE COMMERCIAL REAL ESTATE COURSES**

9. Provide market and advertising methods. (*SEE #14 AND #15*)

**1. Depending on the property, market to the local realtors via flyers, emails and the Board of Realtors. Perform Realtor seminars and tours.**

**2. Heavy exposure on the Internet.**

**3. Also, alert the commercial investor community of investment opportunities.**

**4. Notify large and small local, national and international companies who need to relocate or expand. Do different analysis to show why these companies should move to this area.**

**5. Advertising methods include some of the following:**

- **REAL ESTATE BOOK (*LOCAL WITH NATIONAL LISTINGS*)**
- **LOCAL NEWSPAPER (*SCRIPPS, PALM BEACH POST, MIAMI HERALD*)**
- **INTERNATIONAL NEWSPAPERS (*NY TIMES, WASHINGTON POST*)**
- **INTERNET (*TRULIA, ZILLOW, CRAIGSLIST, BACKPAGE, LOOPNET, CITYFEET, BIZ BUY/SELL, EBAY, OODLE, REALTOR.COM, LINKEDIN, TWITTER, ETC.*)**
- **FLYERS**
- **DOWNTOWN FORT PIERCE STORE FRONT LISTING DISPLAY**
- **WEBSITE FleischmanRealtyGroup.com**

10. List knowledge of public real estate records that will be used by your firm.

**CITY OF FORT PIERCE**

**COUNTY OF ST. LUCIE TAX ASSESSOR OFFICE**

**COUNTY OF ST. LUCIE COUNTY CLERK'S OFFICE**

11. List method(s) use for rent/lease assessment

**PERFORMING A BROKER PRICE OPINION USING MLS, LOOPNET  
CITYFEET ETC.**

12. Method used for background checks.

**WE USE TENANTREPORTS.COM WHICH IS A SCREENING SERVICE FOR CREDIT AND BACKGROUND CHECKS OF COMPANIES AND INDIVIDUALS, DUNN AND BRADSTREET FOR COMPANIES.**

13. List marketing strategies used for lease properties

**Depending on the property the following might be used:**

- Invest in high quality professional photographs or renderings that can be used across all online and offline marketing efforts. A fundamental step towards introducing your property to potential customers is through strong, visual and atmospheric imagery that brings the property to life and tells its unique story.
- Create an identity and brand for the property – establish a reputation by creating an original identity and logo for the property that targets your niche market.
- Define your key message(s) – what makes this property stand out from competitors? Crafting the value proposition with good copy will help set the foundation for your marketing communications and materials.

**Offline Marketing Plan**

- **Print collateral** – invest in high-end print collateral such as a glossy brochure, flyers, research and other marketing materials that tell prospective customers the right story about your commercial real estate property. Where possible, ensure that the design can be adapted for digital use.
- **Display and window signage** – stand out from a multitude of other properties by reinforcing the brand and creating an eye-catching banner, monument sign or window graphic that visually showcases what the property has to offer in a nutshell.
- **Broker events** – stage a memorable networking event at the property that will enable you to connect directly with prospective customers and brokers within the environment of the product you are promoting.
- **Print media** – it always pays to build brand awareness and maintain a strong and active presence in major newspapers and industry specific magazines.
- **Direct mail** – mail can still be an effective way of getting property information into the hands of brokers, if done correctly. The key to success is access to a laser targeted list and investing in a direct mail piece that stands out.

**Online Marketing Plan**

- **Digital brochures** – attention grabbing and creative digital brochures that can be sent via email are ideal for bridging the gap to a wider audience.
- **Website development** – create and launch a custom-made website that allows users to find, view and interact with key information at the click of a button. With almost 80% of investors and tenants starting their search online, it's imperative your website not only looks good, but also can be found. Websites need to be visual, informative and user-friendly for any device (desktop, tablet and mobile).
- **Outreach marketing** – attract potential tenants and investors by connecting with 3rd party journalists, industry influencers, analysts and bloggers that can produce effective press coverage and industry specific articles.
- **Email campaigns** – Include information about the property as well as relevant industry updates and be sure to link it back to your website and social media pages.

- **Online press release** – this trusty PR tool allows us to stay ahead of the game and as it's online it can be passed on and shared at the click of a button.
- **Social Media** –Twitter and LinkedIn are used to demonstrate expertise and get the corporate message across in a more informal way.
- **Media placements** – buying advertising space in relevant online magazines, business journals and news publications will make sure you are generating impressions in front of your target audience and help your property to ride high in Google search engine results.

- **REAL ESTATE BOOK (LOCAL WITH NATIONAL LISTINGS)**
- **LOCAL NEWSPAPER (SCRIPPS, PALM BEACH POST, MIAMI HERALD)**
- **INTERNATIONAL NEWSPAPERS (NY TIMES, WASHINGTON POST)**
- **INTERNET (TRULIA, ZILLOW, CRAIGSLIST, BACKPAGE, LOOPNET, CITYFEET, BIZ BUY/SELL, EBAY, OODLE)**
- **FLYERS**
- **DOWNTOWN FORT PIERCE STORE FRONT LISTING DISPLAY**
- **WEBSITE FleischmanRealtyGroup.com**

14. List marketing strategies used for properties for sale

**Depending on the property the following might be used:**

- Invest in high quality professional photographs or renderings that can be used across all online and offline marketing efforts. A fundamental step towards introducing your property to potential customers is through strong, visual and atmospheric imagery that brings the property to life and tells its unique story.
- Create an identity and brand for the property – establish a reputation by creating an original identity and logo for the property that targets your niche market.
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- **FLYERS**
- **DOWNTOWN FORT PIERCE STORE FRONT LISTING DISPLAY**
- **WEBSITE FleischmanRealtyGroup.com**

15. List current and past litigation of your firm within the past five (5) years.


**NONE**

16. Provide a list of three (3) past clients for this size and type of property

Client name	Telephone#	Email	Property Title
<b>BRIAN STONE</b>	<b>772-370-4777</b>	<b>bstone@boatloans.net</b>	<b>201 S 2<sup>ND</sup> ST.</b>
<b>ARIF PARUPIA</b>	<b>772-370-7573</b>	<b><u>peterpl1@optonline.net</u></b>	<b>529 NW PRIMA VISTA</b>
<b>MARK FREDERICK</b>	<b>858-504-0864</b>	<b>landmarkfrederick@gmail.com</b>	<b>1144 &amp; 1156 S OCEAN</b>

17. Is your firm a member of Multiple Listing Service (MLS)?  
**YES, Beaches MLS has been a member in good standing since 2004.**

18. Broker agrees to abide by the terms and conditions of the City Contract.

  
 \_\_\_\_\_ BROKER  
 Signature

19. ADDENDUM ACKNOWLEDGMENT - Proposer acknowledges that the following addenda have been received and are included in his/her proposal:

Addendum Number	Date Issued
1	January 5, 2016

20. Please enter below the percentage of the NET value (after all expenses) of the lease or sale that your firm will charge for the services that you will be providing. The City will not enter into an open-ended contract. This would be a one-time fee percentage of the new value of the lease or value of the net sale to the City.

Service	Fee
Sale	3.75% Net value
Lease	4% Net Value
Additional Services	Rate
Hourly rate for non-commission services.....	\$75.00 per hour
Additional advertising.....	10% over cost



### Certification Statement Local Vendor Preference

I certify that my company meets all of the following qualifications to be eligible for the local vendor preference:

- 1) That my company has a fixed, staffed office or distribution point located in and having a street address within St. Lucie, Indian River, Martin or Okeechobee City for at least one year prior to the issuance of the request for competitive bids or request for proposals by St. Lucie City; and
- 2) That my company holds any business or Broker license required by St. Lucie City and/or can document payment of business license taxes in St. Lucie City;
- 3) That my company is principal offeror who is single offeror; a business which is the prime Broker and not a subBroker; or a partner or joint venturer submitting an offer in conjunction with other businesses.
- 4) Attached is a copy of a business or Broker license and/or business tax receipt for St. Lucie City, Indian River, Martin or Okeechobee Counties to verify that I have been in business at least one year prior to the issuance of the Request for Bid or Proposal.

Company Name: FLEISCHMAN REALTY GROUP, LLC

Address: 220 ORANGE AVE, FORT PIERCE, FL 34950

Business or Broker License Number: 3068356

Phone Number: 772-905-8702 Fax Number: 772-905-4900

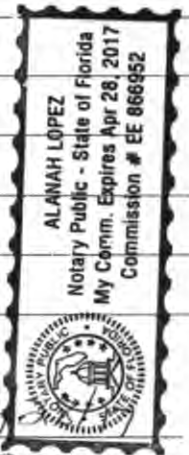
Owner's Name: LAURA FLEISCHMAN

Signature: [Handwritten Signature]

Sworn to before me this 12<sup>th</sup> day of Jan, 2016

Notary Public for the State of Florida My Commission Expires 4/28/2017

Notary Public Signature [Handwritten Signature] Printed Name Alannah Lopez



#### FOR PROCURMENT OFFICE ONLY ~ DO NOT COMPLETE BELOW

To be verified and completed by an authorized representative from the City of Fort Pierce Purchasing Department:

Vendor Certified by: \_\_\_\_\_ Date: \_\_\_\_\_  
(Authorized Signature)

To be approved as a local bidder and receive bid preference on an eligible local project, this certification and a copy of your local business or Broker license must be submitted with your bonafide Bid/RFP package.



## DRUG-FREE WORK PLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certified that

**FLEISCHMAN REALTY GROUP, LLC**

does:

*(Name of Business)*

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or Agreemental services that are proposed a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or Agreemental services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

*Proposer's Signature*

**JANUARY 12, 2016**

*Date*

**Request for Taxpayer  
 Identification Number and Certification**

Give form to the requester. Do not send to the IRS.

Name (as shown on your income tax return)  
**FLEISCHMAN REALTY GROUP, LLC**

Business name, if different from above

Check appropriate box:  Individual/sole proprietor  Corporation  Partnership  
 Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ **S...**  Exempt payee  
 Other (see instructions) ▶

Address (number, street, and apt. or suite no.)  
**220 ORANGE AVE**

City, state, and ZIP code  
**FORT PIERCE, FL 34950**

List account number(s) here (optional)

Requester's name and address (optional)

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number  
 : :  
 or  
 Employer identification number  
**27 : 0914025**

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

Sign Here Signature of U.S. person ▶ *[Signature]* Date ▶ **JANUARY 12, 2016**

**General Instructions**  
 Section references are to the Internal Revenue Code unless otherwise noted.

**Purpose of Form**  
 A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

Note. If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,



## CITY OF FORT PIERCE PROPOSER'S CHECKLIST

This checklist is provided to assist each Proposer in the preparation of their proposal response. Included in this checklist are important requirements, which is the responsibility of each Proposer to submit with their response in order to make their response fully compliant. This checklist is only a guideline~ it is the responsibility of each Proposer to read and comply with the Request for Proposal in its entirety.

Check "Yes" or "No" to each of the following:

	YES	NO
Is Request for Proposal cover page (page 1) completed, signed and attached?	<u>X</u>	_____
All prices have been reviewed for mathematical accuracy, all price corrections initialed, and all price extensions and totals thoroughly checked.	<u>X</u>	_____
Include proof of proper licensing as stated in proposal documents.	<u>X</u>	_____
Include proof of proper insurance as stated in proposal documents.	<u>X</u>	_____
Proposal envelope is marked accordingly.	<u>X</u>	_____
Is Drug-Free Work Place form signed and enclosed?	<u>X</u>	_____
W-9 Form completed, signed and attached?	<u>X</u>	_____
Are six (6, one original and five copies) complete proposal packages and one electronic (PDF) on a USB Flash Drive included?	<u>X</u>	_____

PLEASE SIGN AND RETURN WITH PROPOSAL

January 5, 2016

CITY OF FORT PIERCE



REAL ESTATE BROKER SERVICES

RFP NO. 2016-012

ADDENDUM NO. 1

The purpose of this addendum is to provide modifications and clarifications to the specification as follows:

Section V – *Statement of Work, Proposer's Questionnaire*, item numbered 7. , has been modified and should read:

7. Proposer sale & lease history of commercial properties? Include the following information:

Date	Commercial Sq. ft.	Location	Sale Price	Annual Lease	Listing Date

All other conditions of this bid remain the same.

Please acknowledge receipt of this addendum and include it with your submittal.

Signature: \_\_\_\_\_  
Manual

Signature: LAURA FLEISCHMAN, BROKER  
Typed or Printed

Company Name: FLEISCHMAN REALTY GROUP, LLC

Address: 220 ORANGE AVE  
FORT PIERCE, FL 34950

Date: JANUARY 12, 2016

/gc

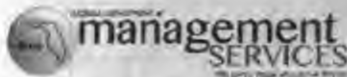
# State of Florida

## Minority, Women & Florida Veteran Business Certification

fleischman realty group

Is certified under the provisions of  
287 and 295.187, Florida Statutes, for a period from:

12/17/2015 to 12/17/2017



A handwritten signature in black ink, appearing to read 'CP' or similar initials.

Chad Poppell, Secretary  
Florida Department of Management Services





RICK SCOTT, GOVERNOR

KEN LAWSON, SECRETARY

Florida Department of  
**Business & Professional  
Regulation**

**STATE OF FLORIDA**  
**DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION**  
**DIVISION OF REAL ESTATE**

THE BROKER HEREIN IS LICENSED UNDER THE  
PROVISIONS OF CHAPTER 475, FLORIDA STATUTES

**FLEISCHMAN, LAURA**

12205 SW BAYBERRY AVE  
PORT ST. LUCIE FL 34987

**LICENSE NUMBER: BK3068356**

**EXPIRATION DATE: SEPTEMBER 30, 2017**

Always verify licenses online at [MyFloridaLicense.com](http://MyFloridaLicense.com)



Do not alter this document in any form.

This is your license. It is unlawful for anyone other than the licensee to use this document.

# RESUME

## **LAURA FLEISCHMAN**

18 West Harbour Isle Drive #202

Ft. Pierce, FL 34949

772-801-9808

[laurafleischman@gmail.com](mailto:laurafleischman@gmail.com)

### **PROFESSIONAL EXPERIENCE**

---

#### **SKILLS SUMMARY**

---

- \* Accounting
- \* Trade Union Liaison
- \* Government Contracts and Negotiation
- \* Customer Service
- \* Attending Trade Conventions
- \* Acquisitions
- \* Affirmative Action Initiatives with knowledge of certification
- \* Public Speaking at various conventions, training classes and procurement/job fairs
- \* Advertising
- \* Procurement
- \* Private Sector Contracts
- \* Computer Savvy
- \* Networking
- \* Preparing Bid Documents
- \* Training/Hiring employees
- \* Marketing and Sales
- \* Project Management
- \* Problem Solving
- \* Scheduling
- \* Great Communication Skills

### **EXPERIENCE**

**2009-PRESENT**      **Fleischman Realty Group**      Fort Pierce, FL  
**Real Estate Broker**

Florida licensed real estate broker of record working with buyers and sellers of residential, commercial real estate. Property management for various residential and commercial customers.

**2008-2009**      **Remax 100 Riverside**      Port St. Lucie, FL  
**REAL ESTATE AGENT- REALTOR**

Florida licensed Realtor working with buyers and sellers of residential, commercial and businesses properties. Property management for various residential and commercial customers

-Following thru on all transactions until successfully closed

-Awarded Presidents Club and 100% Club

**2006-2007**      **Kent's Sportsbar Café**      Sunny Isles Beach

#### **OWNER/MANAGER**

Opened, renovated and successfully operated a sportsbar/restaurant.

Sold July 2007

**2005-2007**                      **Remax Bestseller Realty**                      Miami Beach, FL

**REAL ESTATE AGENT - REALTOR**

-Acquisition of property in Miami-Dade, Broward, West Palm Beach and St. Lucie Counties. Buy, Sell, Lease, Negotiate and manage residential and commercial properties.

**2003 - 2005**                      **Remax 100 Riverside**                      Port St. Lucie, FL

**REAL ESTATE AGENT - REALTOR**

Florida licensed Realtor working with buyers and sellers of residential, commercial and businesses. Manage properties for out of town owners and investors.

- Following thru on all transactions until successfully closed
- Awarded Presidents Club and 100% Club

**1993-2002**                      **CUI Elevator Specialist**                      Jersey City, NJ

**President/CEO**

- Owned and operated a very successful elevator maintenance, modernization and installation company.
- Involved with the bidding process from contracts, A/R, A/P, blueprints, bonding, pre-bid meetings, estimating, safety, construction, punch list, inspections up until final payment
- Managed 25 union employees in NY, NJ and PA
- Awarded Contractor of the Year by Tishman Construction and the Regional Alliance of NY and NJ.
- Articles regarding my business in the Asbury Park Press and the Star Ledger newspapers
- Successfully sold the company to Otis Elevator in 2002

**WEICHERT REALTORS REAL ESTATE SALES, NJ**

**IBM - CUSTOMER ENGINEER**

**NY STOCK EXCHANGE - ADMINISTRATIVE ASSISTANT**

## **EDUCATION**

Rutgers University –Business and Computer Science

Ocean County College NJ –Business and Computer Science

New Jersey Real Estate Course and License

Florida Real Estate Course and License

Florida Community Association Manager License

Various construction management courses by:

Regional Alliance of NY & NJ  
GE Small Business School  
PSE&G Small Business School  
OSHA Safety Courses

## **INTERESTS**

Volunteer for the American Red Cross, Treasure Coast

Rotary Club of Miami Beach

Volunteer for Miami Hope for the Homeless

Board of Director of New Jersey Statewide Hispanic Chamber of Commerce

## **Additional Information:**

US Citizen born in New York City



STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND  
PROFESSIONAL REGULATION

SL3114496

ISSUED: 09/21/2014

REAL ESTATE SALES ASSOCIATE  
FLEISCHMAN, KENT



IS LICENSED under the provisions of Ch. 475 FS.

Expiration date SEP 30, 2016

L1409210003908



STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND  
PROFESSIONAL REGULATION

SL3086075

ISSUED 03/04/2014

REAL ESTATE SALES ASSOCIATE  
FLEISCHMAN KENT



IS LICENSED under the provisions of Ch. 475 FS.

Expiration date: MAR 31, 2016

L1403640001031

No. 16-00027261

# CITY OF FORT PIERCE BUSINESS TAX RECEIPT

2015 - 2016

100 N. U.S. # 1 - Fort Pierce, FL - 34950  
772-467-3000

BUSINESS NAME FLEISCHMAN REALTY GROUP : FLEISCHMAN, LAURA PRINCIPAL

MAILING ADDRESS 220 ORANGE AVE LOCATION 220 ORANGE AVE

FT PIERCE FL 34950 PHONE 801-9808

**may hereby engage in the following business, profession or occupation.**

CLASSIFICATION: 188A REAL ESTATE OFFICE  
REAL ESTATE OFFICE

IN THE CITY OF FORT PIERCE, FLA. FOR THE PERIOD BEGINNING ON THE 1ST DAY OF OCTOBER AND ENDING SEPTEMBER 30.  
ISSUED ..... DECEMBER ..... 30 ..... 2015

This Receipt becomes null and void if business name, classification, ownership or address is changed.

I understand and agree that issuance of a Business Tax Receipt **does not** allow occupancy, nor exempt the possessor from compliance with any City Code or Ordinance. Receipt may be revoked in accordance with Section 9-29.

*Linda W Cox* (SEAL)  
CITY-CLERK

TAX AMOUNT	\$	78.58
NEW / RENEWAL FEE	\$	8.00
PENALTY	\$	18.93
TOTAL	\$	105.51

THIS RECEIPT MUST BE PROMPTLY POSTED FOR PUBLIC VIEW



# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

12/30/2015

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 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).

<b>PRODUCER</b> Hiscox Inc. 520 Madison Avenue 32nd Floor New York, NY 10022	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): (888) 202-3007		<b>FAX (A/C, No):</b>	
	<b>E-MAIL ADDRESS:</b> contact@hiscox.com			
<b>INSURED</b> Fleischman Realty Group, LLC 220 Orange Ave Fort Pierce FL 34950	<b>INSURER(S) AFFORDING COVERAGE</b>		<b>NAIC #</b>	
	<b>INSURER A:</b> Hiscox Insurance Company Inc		10200	
	<b>INSURER B:</b>			
	<b>INSURER C:</b>			
	<b>INSURER D:</b>			
	<b>INSURER E:</b>			

**COVERAGES****CERTIFICATE NUMBER:****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"/> <b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input checked="" type="checkbox"/> OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: <input checked="" type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC OTHER:			UDC-1418408-CGL-15	01/28/2015	01/28/2016	EACH OCCURRENCE	\$ 1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	\$ 100,000
							MED EXP (Any one person)	\$ 5,000
							PERSONAL & ADV INJURY	\$ 0
							GENERAL AGGREGATE	\$ 2,000,000
							PRODUCTS - COMP/OP AGG	\$ S/T Gen. Agg.
								\$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident)	\$
							BODILY INJURY (Per person)	\$
							BODILY INJURY (Per accident)	\$
							PROPERTY DAMAGE (Per accident)	\$
								\$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED RETENTION \$						EACH OCCURRENCE	\$
							AGGREGATE	\$
								\$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				PER STATUTE	OTH-ER
							E.L. EACH ACCIDENT	\$
							E.L. DISEASE - EA EMPLOYEE	\$
							E.L. DISEASE - POLICY LIMIT	\$

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

**CERTIFICATE HOLDER****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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# CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY)

12/30/2015

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 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).

<b>PRODUCER</b> Hiscox Inc 520 Madison Avenue 32nd Floor New York, NY 10022	<b>CONTACT NAME:</b> PHONE (A/C, No, Ext): (888) 202-3007      FAX (A/C, No): E-MAIL ADDRESS: contact@hiscox.com	
	<b>INSURER(S) AFFORDING COVERAGE</b> <b>NAIC #</b>	
<b>INSURED</b>  Fleischman Realty Group, LLC 220 Orange Ave  Fort Pierce      FL 34950	<b>INSURER A:</b> Hiscox Insurance Company Inc      10200	
	<b>INSURER B:</b>	
	<b>INSURER C:</b>	
	<b>INSURER D:</b>	
	<b>INSURER E:</b>	
	<b>INSURER F:</b>	

**COVERAGES**      **CERTIFICATE NUMBER:**      **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
	<b>COMMERCIAL GENERAL LIABILITY</b> <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 \$ \$
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> ALL OWNED AUTOS <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> HIRED AUTOS <input type="checkbox"/> NON-OWNED AUTOS						COMBINED SINGLE LIMIT (Ea accident) \$ BODILY INJURY (Per person) \$ BODILY INJURY (Per accident) \$ PROPERTY DAMAGE (Per accident) \$ \$
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE DED    RETENTION \$						EACH OCCURRENCE \$ AGGREGATE \$ \$
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N	N/A				PER STATUTE    OTH-ER E.L. EACH ACCIDENT \$ E.L. DISEASE - EA EMPLOYEE \$ E.L. DISEASE - POLICY LIMIT \$
A	Professional Liability			UDC-1418408-EO-15	01/28/2015	01/28/2016	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)

<b>CERTIFICATE HOLDER</b>	<b>CANCELLATION</b> 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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STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
DIVISION OF REAL ESTATE



<b>LICENSE NUMBER</b>	
CQ1035236	

The CORPORATION  
Named below HAS REGISTERED  
Under the provisions of Chapter 475 FS.  
Expiration date: MAR 31, 2016

FLEISCHMAN REALTY GROUP  
201 SOUTH 2ND ST SUITE 111-112  
FORT PIERCE FL 34950



ISSUED: 03/30/2014

DISPLAY AS REQUIRED BY LAW

SEQ # L1403300006411



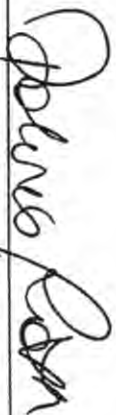
CERTIFIED DISTRESSED PROPERTY EXPERT<sup>®</sup>

# CERTIFICATE OF COMPLETION

This Certificate of Completion Confirms that

**Laura Fleischman**

Has completed the rigorous course of study necessary to become a Certified Distressed Property Expert.



CDPE Course Instructor

March 5, 2010

Date of Completion

Awarded By Distressed Property Institute, LLC



TRANSNATIONAL REFERRAL  
CERTIFICATION

This certificate is awarded to

*Laura Fleischman*

In recognition of completion of the Transnational Referral Certification (TRC)  
Awarded by the International Consortium of Real Estate Associations.

  
Richard Mendenhall

Richard Mendenhall, ICREA Co-Chair



Timo Smit, ICREA Co-Chair

*November 11, 2005, Miami, Florida*  
Date & Location

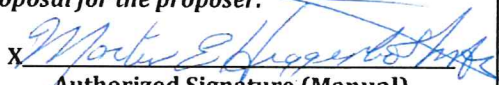


WORLDPROPERTIES.COM



International Consortium of Real Estate Associations

ICREA™

<p><b>DELIVER TO:</b>                  City of Fort Pierce                  100 North U.S. #1                  Fort Pierce, FL 34950</p> <p><b>MAIL TO:</b>                  City of Fort Pierce Procurement Dept.                  P.O. Box 1480                  Fort Pierce, FL 34954-1480</p>	<p><b>REQUEST                  FOR                  PROPOSALS                  and                  PROPOSER                  ACKNOWLEDGMENT</b></p>
<p><b>Contact: Gelencia Carter, 772-467-3748</b></p>	<p><b>RFP No: 2016-012</b></p>
<p><b>Mandatory Pre-Bid Conference Date:</b>                  N/A</p>	<p><b>RFP Title: REAL ESTATE                  BROKER SERVICES</b></p>
<p><b>Mandatory Pre-Bid Location:</b>                  N/A</p>	<p><b>RFP Opening Location:</b>                  City of Ft. Pierce Procurement Dept.                  100 North U.S. #1, 1st Floor                  Ft. Pierce, Florida 34950</p>
<p><b>RFP Due Date &amp; Time:</b>                  3:00 PM, TUESDAY, JANUARY 12, 2016</p>	<p>If you need any reasonable accommodation for any type of disability in order to participate in this procurement, please contact this department as soon as possible.</p>
<p><b>Proposer Name:</b>                  Higgenbotham Auctioneers International Limited, Inc.                  -----</p> <p><b>Mailing Address:</b>                  5900 Imperial Lakes Blvd.                  -----                  -----                  -----</p>	<p><i>I hereby certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this proposal for the proposer.</i></p> <p style="text-align: center;">                   X _____                  Authorized Signature (Manual)             </p>
<p><b>City, State, Zip Code:</b>                  Mulberry, FL 33860</p>	<p><b>Typed or Printed Name:</b>                  Martin E. Higgenbotham</p>
<p><b>Type of Entity (Circle One):</b> Corporation                  Corporation Partnership Proprietorship</p>	<p><b>Title:</b>                  President</p>
<p><b>Incorporated in the State of:</b> Florida    <b>Year:</b> 1991</p>	<p><b>Delivery in _____ days, ARO</b></p>
<p><b>Phone Number:</b> (863)-644-6681</p>	<p><b>Payment Terms:</b> Net 30 Days</p>
<p><b>Fax Number:</b> (863) 644-6686</p>	<p><b>FEIN or SS Number:</b> 59-3072547</p>
<p><b>E-Mail Address:</b> marty@higgenbotham.com</p>	<p><b>Local Business:</b> __Y <input checked="" type="checkbox"/>__N    <b>MWBE:</b> __Y <input type="checkbox"/>__N</p>
<p><b>Bid Security is attached, when required, in the amount of \$ _____</b>  <b>F.O.B. DESTINATION</b></p>	<p><b>If returning as a "No Bid" state reason:</b></p>
<p><b>THIS PAGE MUST BE COMPLETED AND RETURNED WITH YOUR BID</b></p>	

**January 5, 2016**



**CITY OF FORT PIERCE**

**REAL ESTATE BROKER SERVICES**

**RFP NO. 2016-012**

**ADDENDUM NO. 1**

The purpose of this addendum is to provide modifications and clarifications to the specification as follows:

Section V – *Statement of Work, Proposer’s Questionnaire*, item numbered 7. , has been modified and should read:

7. Proposer sale & lease history of commercial properties? Include the following information:

Date	Commercial Sq. ft.	Location	Sale Price	Annual Lease	Listing Date

All other conditions of this bid remain the same.

Please acknowledge receipt of this addendum and include it with your submittal.

Signature:   
Manual

Signature: MARTIN E. HIGGENBOTHAM, PRESIDENT  
Typed or Printed

Company Name: Higgenbotham Auctioneers International Limited, Inc.

Address: 5900 Imperial Lakes Boulevard  
Mulberry, FL 33860

Date: 1/8/2016

/gc



**PROPOSER'S QUESTIONNAIRE**  
**RFP #2016-012**  
Real Estate Broker Services

It is understood and agreed that the following information is to be used by the City of Fort Pierce to determine the qualifications of Proposers to perform the work required. The Proposer waives any claim against the City that might arise with respect to any decision concerning the qualifications of the Proposer.


The undersigned attests to the truth and accuracy of all statements made on this questionnaire. Also, the undersigned hereby authorizes any public official, person, firm or corporation to furnish the City of Fort Pierce any pertinent information requested by the City deemed necessary to vary the information on this questionnaire.

Dated this 8<sup>th</sup> day of January, 2016.

Higgenbotham Auctioneers International Limited, Inc.

Name of Organization / Proposer

By: \_\_\_\_\_

  
Martin E. Higgenbotham, President

(If more space is needed, please attach additional sheets.)

1. Corporation, Partnership, Joint Venture, Individual or other?

Corporation

2. Firm's name and main office address, telephone and fax number, e-mail:

Higgenbotham Auctioneers International Limited, Inc.  
5900 Imperial Lakes Boulevard  
Mulberry, FL 33860  
(863) 644-6681  
(863) 644-6686  
marty@higgenbotham.com

3. Give the names of the persons who will be authorized to make decisions and speak as a representative of the Proposer, their titles, addresses and telephone and facsimile numbers.

Martin E. Higgenbotham, President  
Higgenbotham Auctioneers International Limited, Inc.  
5900 Imperial Lakes Boulevard  
Mulberry, FL 33860  
(863) 644-6681  
(863) 644-6686 FAX  
[marty@higgenbotham.com](mailto:marty@higgenbotham.com)

Brett A. Vogeler, Broker  
 Higgenbotham Real Estate  
 3616 Harden Boulevard, Suite 358  
 Lakeland, FL 33803  
 (863) 644-6681  
 (863) 583-0685 FAX  
 (863) 255-1613 CELL

4. Firm's previous names (if any): None
5. How many years has your organization or individual been in commercial real estate business and locations?

Years: 59      Location(s): Lakeland, FL, Mulberry, FL

Licenses: FL Real Estate Broker and Auctioneers Licenses

Certifications: Member, Certified Auctioneers Institute  
 Member, National Auctioneers Association and Hall of Fame  
 Member, Florida Auctioneers Association  
 Accredited Auctioneer of Real Estate  
 Certified Estate Specialist  
 Member, National and Florida Association of Realtors

6. Names of personnel (if other than Proposer) that will be performing requested realtor services/work:

Brett Vogeler, MBA, Broker  
 Chris Vaughan, MBA, AARE, Regional Director, Broker, Auctioneer and Field Manager  
 Don Gabriel, CCIM, Regional Director & Broker

7. Proposer sale & lease history for properties of 115,000 SQ and above?

Sale Date	Commercial SF	Location	Sale Price	Annual Lease	Listing Date
5/23/2002	720,000	Winter Haven, FL	\$5,100,000	NA	3/1/2002
3/1/2005	264,111	Elizabethton, TN	\$1,500,000	NA	1/6/2005
3/1/2005	257,530	Princeville, IL	\$579,000	NA	1/6/2005
10/11/2005	121,267	Kannapolis, NC	\$1,320,000	NA	8/5/2005
6/1/2006	132,974	Midland, TX	\$1,072,500	NA	3/15/2006
6/1/2006	153,364	Midland, TX	\$1,100,000	NA	3/15/2006
6/16/11	375,000	Hernando, MS	\$473,000	NA	4/21/2011
10/18/2011	134,557	Camillus, NY	\$231,000	NA	8/18/2011

There are many more, but above are several examples of our work to sell large commercial/industrial buildings.

8. List training/education of Proposer and Proposer staff that will be assigned to this project:

Certified Auctioneers Institute, National Auctioneers Association  
 Certified Commercial-Investment Member, National Association of Realtors  
 Accredited Auctioneer of Real Estate, National Auctioneers Association  
 Auction Marketing Management, National Auctioneers Association  
 B.S. Finance, M.B.A., Real Estate & Urban Development with Honors

9. Provide market and advertising methods.

Social Media, Direct Mail, Email, Digital, Print, Press Releases, Signage, etc. among others. Please see the marketing section of our proposal. We have our own in-house advertising agency, Brenmar Advertising.

10. List knowledge of public real estate records that will be used by your firm.

We have utilized hundreds of recorded public documents in our firm, including deeds, mortgages, trust deeds, foreclosures, easements, rights-of-way, leases, etc.

11. List method(s) use for rent/lease assessment

Discounted cash flow analysis including IRR and NPV. Lease versus sell/lease analysis. Lease abstracts. Use CCIM analytical tools including REI-Wise.

12. Method used for background checks.

We have utilized several services for this specific item.

13. List marketing strategies used for lease properties

Social Media, Direct Mail, Email, Digital, Print, Press Releases, Signage, etc. We have our own in-house advertising agency, Brenmar Advertising which handles all of this in addition to direct contact by our broker.

14. List marketing strategies used for properties for sale

Primarily the auction method of marketing because it is time-defined, transparent, no contingencies, no representations or warranties of any kind other than marketable title. It also achieves the highest present value cash value. However, we can also conduct traditional list/sell real estate marketing through our in-house real estate firm, Higgenbotham Real Estate.

15. List current and past litigation of your firm within the past five (5) years.

NONE.

16. Provide a list of three (3) past clients for this size and type of property

Client Name	Telephone	Email	Property Title
Missouri Dept. of Transportation	(417) 829-8037	<a href="mailto:stephen.shelton@modot.mo.gov">stephen.shelton@modot.mo.gov</a>	Joplin, MO office building
Century Retail	(863) 802-1005	<a href="mailto:bobm@maddeninc.com">bobm@maddeninc.com</a>	25 Commercial Bldgs.
State of Kansas	(785) 296-5909	<a href="mailto:linda.thomas@da.ks.gov">linda.thomas@da.ks.gov</a>	Office & Industrial Bldgs.

17. Is your firm a member of Multiple Listing Service (MLS)? Yes

18. Broker agrees to abide by the terms and conditions of the City Contract.

  
Signature

President  
Title

19. ADDENDUM ACKNOWLEDGMENT - Proposer acknowledges that the following addenda have been received and are included in his/her proposal:

Addendum Number	Date Issued
1	1/5/2016

20. Please enter below the percentage of the NET value (after all expenses) of the lease or sale that your firm will charge for the services that you will be providing. The City will not enter into an open-ended contract. This would be a one-time fee percentage of the new value of the lease or value of the net sale to the City.

Service	Fee
Sale - Traditional	5.99% Net Value; Split 50/50 with Cooperating Broker
Sale - Auction	7.99% of High Bid Price assuming a 10% Buyer's Premium (the Buyer, rather than the Seller, pays our commission; the remaining 2.01% the Buyer pays accrues to the City). 20% of Net Commission paid to properly registered buyer broker.
Lease	5.99% Net Value Split 50/50 with Cooperating Broker
Additional Services	Rate
Marketing & Auction Expenses	Direct Reimbursement based on pre-approved budget.

POLK COUNTY LOCAL BUSINESS TAX RECEIPT  
ACCOUNT NO. 2234

CLASS: B

EXPIRES: 9/30/2016

OWNER NAME  
HIGGENBOTHAM, MARTIN

LOCATION  
5900 IMPERIAL LAKES BLVD  
MULBERRY

BUSINESS NAME AND MAILING ADDRESS

MARTIN HIGGENBOTHAM  
5900 IMPERIAL LAKES BLVD  
MULBERRY, FL 33811

CODE	ACTIVITY TYPE
440012	NON-PREPARED FOODSALE-MOBILE
530080	REAL ESTATE BROKER
540040	AUCTIONEER

PROFESSIONAL LICENSE (IF APPLICABLE)  
AB158



OFFICE OF JOE G. TEDDER, CFC \* TAX COLLECTOR

THIS POLK COUNTY LOCAL BUSINESS TAX RECEIPT MUST BE  
CONSPICUOUSLY DISPLAYED AT THE BUSINESS LOCATION

PAID-1504500.0001-0002 12/23/2015 12/23/2015 PAW 158 11.56 HIGGENBOTHAM AUCTIONEERS

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

<b>LICENSE NUMBER</b>	
AU305	

The AUCTIONEER  
Named below IS LICENSED  
Under the provisions of Chapter 468 FS.  
Expiration date: NOV 30, 2017

HIGGENBOTHAM, MARTIN E  
3816 INDUSTRY BLVD  
LAKELAND FL 33811



ISSUED: 09/06/2015

DISPLAY AS REQUIRED BY LAW

SEQ # L1509060002291

STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
DIVISION OF REAL ESTATE

<b>LICENSE NUMBER</b>	
CQ270438	

The CORPORATION  
Named below HAS REGISTERED  
Under the provisions of Chapter 475 FS.  
Expiration date: SEP 30, 2016

HIGGENBOTHAM AUCTIONEERS INTRNATL LTD INC  
3816 INDUSTRY BLVD  
LAKELAND FL 33811



ISSUED: 08/26/2014

DISPLAY AS REQUIRED BY LAW

SEQ # L1408260002768

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

<b>LICENSE NUMBER</b>	
AB158	

The AUCTION BUSINESS  
Named below IS LICENSED  
Under the provisions of Chapter 468 FS.  
Expiration date: NOV 30, 2017

HIGGENBOTHAM AUCT. INTER, LTD.  
MARTIN E HIGGENBOTHAM  
3816 INDUSTRY BLVD  
LAKELAND FL 33811



ISSUED: 09/06/2015

DISPLAY AS REQUIRED BY LAW

SEQ # L1509060002325

RICK SCOTT, GOVERNOR

KEN LAWSON, SECRETARY

STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
DIVISION OF REAL ESTATE

LICENSE NUMBER

BK39329

The BROKER

Named below IS LICENSED

Under the provisions of Chapter 475 FS.

Expiration date: SEP 30, 2016

HIGGENBOTHAM, MARTIN  
3816 INDUSTRY BLVD  
LAKELAND FL 33811



ISSUED: 08/21/2014

DISPLAY AS REQUIRED BY LAW

SEQ. # L1408210002329

RICK SCOTT, GOVERNOR

KEN LAWSON, SECRETARY

STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND PROFESSIONAL REGULATION  
DIVISION OF REAL ESTATE

LICENSE NUMBER

BK3154683

The BROKER

Named below IS LICENSED  
Under the provisions of Chapter 475 FS.  
Expiration date: MAR 31, 2016

VOGELER, BRETT ALAN  
3616 HARDEN BLVD # 358  
LAKELAND FL 33803-5938



ISSUED: 03/13/2014 SEQ # L1403130002049  
DISPLAY AS REQUIRED BY LAW



<b>Y INSURANCE</b>	Date 1/11/2016
--------------------	-------------------

This Certificate is issued as a matter of information only and confers no rights upon the Certificate Holder. This Certificate does not amend, extend or alter the coverage afforded by the policies below.

Insurers Affording Coverage	NAIC #
Insurer A: Lion Insurance Company	11075
Insurer B:	
Insurer C:	
Insurer D:	
Insurer E:	

indicated. Notwithstanding any requirement, term or condition of any contract or other document described herein is subject to all the terms, exclusions, and conditions of such policies. Aggregate

Effective Date (MM/DD/YY)	Policy Expiration Date (MM/DD/YY)	Limits	
		Each Occurrence	\$
		Damage to rented premises (EA occurrence)	\$
		Med Exp	\$
		Personal Adv Injury	\$
		General Aggregate	\$
		Products - Comp/Op Agg	\$
		Combined Single Limit (EA Accident)	\$
		Bodily Injury (Per Person)	\$
		Bodily Injury (Per Accident)	\$
		Property Damage (Per Accident)	\$
		Each Occurrence	
		Aggregate	
1/2016	01/01/2017	<input checked="" type="checkbox"/> WC Statutory Limits	
		<input type="checkbox"/> OTH-ER	
		E.L. Each Accident	\$1,000,000
		E.L. Disease - Ea Employee	\$1,000,000
		E.L. Disease - Policy Limits	\$1,000,000

Company is A.M. Best Company rated A- (Excellent). AMB # 12616

**Assignment/Special Provisions:** Client ID: 84-65-988  
 Policies that are leased to the following "Client Company":  
**International Limited, Inc.**  
 Employees active employee(s), while working in: FL.  
 : Company or any other entity.  
 Request to (727) 937-2138 or by calling (727) 938-5562.

**Begin Date 10/1/2012**

**TERMINATION**  
 Any of the above described policies be cancelled before the expiration date thereof, the issuing company will endeavor to mail 30 days written notice to the certificate holder named to the left, but failure to do so will impose no obligation or liability of any kind upon the insurer, its agents or representatives.

*John A. Bonura*

CUSTOMER NUMBER: 688931

RUN DATE: 01-11-16

THE ETTENSOHN AGENCY INC  
3504 S FLORIDA AVE  
LAKELAND, FL 33803

ALLSTATE BUSINESS INSURANCE  
2775 SANDERS RD  
SUITE E1W  
NORTHBROOK, IL 60062

Policy Number  
648189230

**THIS ENDORSEMENT CHANGES THE POLICY.  
PLEASE READ IT CAREFULLY.  
COMMON POLICY CHANGE ENDORSEMENT**

Endorsement No. 002

**Allstate Insurance Company**

Named Insured HIGGENBOTHAM AUCTIONEERS  
(SEE NAMED INSURED ENDORSEMENT)

Effective Date: 01-11-16  
12:01 A.M., Standard Time

Agent Name THE ETTENSOHN AGENCY INC

This endorsement will not be used to decrease coverages, increase rates or deductibles or alter any terms or conditions of coverage unless at the sole request of the insured.

**COVERAGE PART INFORMATION – Coverage parts affected by this change as indicated by  below.**

- Commercial Property
- Commercial General Liability
- Commercial Crime
- Commercial Inland Marine
- COMMERCIAL AUTOMOBILE NO CHARGE
- 

The following item(s):

- |  |   |
|--|---|
| <input type="checkbox"/> Insured's Name                        | <input type="checkbox"/> Insured's Mailing Address                  |
| <input type="checkbox"/> Policy Number                         | <input type="checkbox"/> Company                                    |
| <input type="checkbox"/> Effective/Expiration Date             | <input type="checkbox"/> Insured's Legal Status/Business of Insured |
| <input type="checkbox"/> Payment Plan                          | <input type="checkbox"/> Premium Determination                      |
| <input type="checkbox"/> Additional Interested Parties         | <input type="checkbox"/> Coverage Forms and Endorsements            |
| <input type="checkbox"/> Limits/Exposures                      | <input type="checkbox"/> Deductibles                                |
| <input type="checkbox"/> Covered Property/Location Description | <input type="checkbox"/> Classification/Class Codes                 |
| <input type="checkbox"/> Rates                                 | <input type="checkbox"/> Underlying Exposure/Insurance              |

is (are) changed to read {See Additional Page(s)}

ALL OTHER TERMS AND CONDITIONS REMAIN THE SAME

The above amendments result in a change in the premium as follows:

**This premium does not include taxes and surcharges.**

No Changes  To be Adjusted at Audit

Additional NO CHARGE Return NO CHARGE

**Tax and Surcharge Changes**

Additional Return

Countersigned By: \_\_\_\_\_ THE ETTENSOHN AGENCY INC  
AUTHORIZED AGENT

**Policy Number**  
**648189230**

**SCHEDULE OF NAMED INSURED(S)**  
**Allstate Insurance Company**

Named Insured HIGGENBOTHAM AUCTIONEERS

Effective Date: 01-11-16  
12:01 A.M., Standard Time

Agent Name THE ETTENSOHN AGENCY INC

DM CW 30 (cont.)

THE NAMED INSURED ON FORM DM CW 30 IS AMENDED TO READ:

HIGGENBOTHAM AUCTIONEERS  
INTERNATIONAL LIMITED, INC.

**Policy Number**  
**648189230**

**SCHEDULE OF FORMS AND ENDORSEMENTS**

**Allstate Insurance Company**

Named Insured HIGGENBOTHAM AUCTIONEERS

Effective Date: 01-11-16  
12:01 A.M., Standard Time

Agent Name THE ETTENSOHN AGENCY INC

COMMON POLICY FORMS AND ENDORSEMENTS

DM CW 30	01-10	COMMON POLICY CHANGE ENDORSEMENT
DM CW 03	01-10	SCHEDULE OF NAMED INSURED(S)
DM CW 12	01-10	SCHEDULE OF FORMS AND ENDORSEMENTS

AUTOMOBILE FORMS AND ENDORSEMENTS

CA 20 48	02-99	DESIGNATED INSURED
----------	-------	--------------------

**THIS ENDORSEMENT CHANGES THE POLICY. PLEASE READ IT CAREFULLY.**

**DESIGNATED INSURED**

This endorsement modifies insurance provided under the following:

- BUSINESS AUTO COVERAGE FORM
- GARAGE COVERAGE FORM
- MOTOR CARRIER COVERAGE FORM
- TRUCKERS COVERAGE FORM

With respect to coverage provided by this endorsement, the provisions of the Coverage Form apply unless modified by this endorsement.

This endorsement identifies person(s) or organization(s) who are "insureds" under the Who Is An Insured Provision of the Coverage Form. This endorsement does not alter coverage provided in the Coverage Form. This endorsement changes the policy effective on the inception date of the policy unless another date is indicated below.

Endorsement Effective: 01-11-2016	Countersigned By:  (Authorized Representative)
Named Insured: HIGGENBOTHAM AUCTIONEERS	

**SCHEDULE**

**Name of Person(s) or Organization(s):**

CITY OF FORT PIERCE  
100 NORTH U.S.  
#1  
FORT PIERCE, FL USA 34950

(If no entry appears above, information required to complete this endorsement will be shown in the Declarations as applicable to the endorsement.)

Each person or organization shown in the Schedule is an "insured" for Liability Coverage, but only to the extent that person or organization qualifies as an "insured" under the Who Is An Insured Provision contained in **Section II** of the Coverage Form.

NAMED INSURED: HIGGENBOTHAM AUCTIONEERS INTER      Allstate Business Insurance      DATE : 01/11/16  
SPECIAL NOTES: 05/07/15      Allstate Insurance Company      TRANS TYPE: ENDORSEMENT #2  
INSURANCE CO : ALLSTATE INSURANCE COMPAN      51 W Higgins Rd Ste R1A  
BUSINESS TYPE: CORPORATION      South Barrington, IL 60010-9300

POLICY NUMBER: 648189230      AGY/PROD NUMBER: 66321      AUD FREQ: NON-AUDITABLE  
CUSTOMER ID : 688931      PROD NAME : THE ETTENSOHN AGENCY INC      OPERATOR: SFL1060B66321  
SYSTEM ASSIGN: 41521040000000

LOB: AUTO (BAP)      EFFECTIVE DATE: 09/01/15      EXPIRE DATE: 09/01/16      ANNIV. DATE :  
LOB (AU) SYS RATING VERS : 74.891

POLICY INFORMATION:      PRD STATE : FL      POL. TERM : 1 YEAR  
MUL/STATE : NO      PKG PROGRAM :

\* \* \* \* POLICY PREMIUM TOTALS \* \* \* \*

LIAB COVERAGES	PREMIUM	PHY DMG COVERAGES	PREMIUM
LIABILITY	5,045.00	COMPREHENSIVE	559.00
NO-FAULT/PIP	393.00	COLLISION	1,095.00
UM/UIM (BI/CSL)	826.00	AUTO LOAN/LEASE GAP	INCL
WAIVER OF SUB	INCL		
FELLOW EMPLOYEE	INCL		
FED TERRORISM - CAT	INCL		
<u>LIABILITY TOTAL PREMIUM</u>	<u>6,264.00</u>	<u>PHY DMG TOTAL PREMIUM</u>	<u>1,654.00</u>

GRAND TOTAL POLICY PREMIUM      7,918.00

EXPERIENCE RATING - LIABILITY:      2,636.00      EXPERIENCE RATING - PHYS DAM:      1,654.00

AUTOMOBILE POLICY LEVEL INFORMATION

POLICY TYPE :	PKG DESC :		
LIABILITY SYMBOL : 7	COMP SYMBOL : 7		
PIP SYMBOL : 5	S/P SYMBOL :		
ADDITIONAL PIP :	COLL SYMBOL : 7		
MED PAY SYMBOL :	TOW SYMBOL :		
UM/UIM SYMBOL : 7/7	TRLR INTER COMP :		
TRLR INTER COLL :	TRLR INTER SCOL :		
FLEET/NONFLEET : NON-FLEET	PHYS DMG ONLY : NO		MULTI-LINE CREDIT : NO
LIABILITY TYPE : COMB SINGLE	LIABILITY LIMIT : 1,000,000		AVG MILE OPT :
LIABILITY DEDUCT :	DEDUCT AMOUNT :		LIAB ILF OVRD :
DEDUCT TYPE :	LIAB DED OVRD :		COMP DED OVRD :
RISK RETENTION : N	RISK RET AMOUNT :		COLL DED OVRD :
PRED MP LIMIT :	PRED COMP DED : 500		PRED COLL DED : 500
FELLOW EMPLOYEE : NO	FELLOW EMP PERCT :		FELLOW EMP MIN :
PER OCCR DED : NO	AGGR DED :		AVG. DRIVER FCTR :
LIAB PD ILF OVRD :	EXCELLERATOR ENDT :		POLL DESC :
TERRORISM : YES	BUSINESS INC ENDT :		NCRF CEDED CD : N
OLD TRANSITION FCT:	NEW TRANSITION FCT:		MOMENTUM FACTOR :

POLICY DRIVER INFORMATION

LICENSE NO : G416176652810	LICENSE STATE : FL
FIRST NAME : DAVID RANDAL	LAST NAME : GILBERT
DATE OF BIRTH : 08/01/1965	INCIDENTS IN THE LAST 3 YRS (QUICK QUOTE) : 0
YEAR LICENSED : 1981	CDL DATE LICENSE :
RELATIONSHIP : EMPLOYEE	
<hr/>	
LICENSE NO : H251012579430	LICENSE STATE : FL
FIRST NAME : ANGELA	LAST NAME : HIGGENBOTHAM
DATE OF BIRTH : 12/03/1957	INCIDENTS IN THE LAST 3 YRS (QUICK QUOTE) : 0
YEAR LICENSED : 1975	CDL DATE LICENSE :
RELATIONSHIP : SPOUSE OF CORPORATE OFFICER	
<hr/>	
LICENSE NO : H251153901220	LICENSE STATE : FL
FIRST NAME : CHARLES	LAST NAME : HIGGENBOTHAM
DATE OF BIRTH : 04/02/1990	INCIDENTS IN THE LAST 3 YRS (QUICK QUOTE) : 0
YEAR LICENSED : 2006	CDL DATE LICENSE :
RELATIONSHIP : EMPLOYEE	
<hr/>	
LICENSE NO : H251565393110	LICENSE STATE : FL
FIRST NAME : MARTIN	LAST NAME : HIGGENBOTHAM
DATE OF BIRTH : 08/31/1939	INCIDENTS IN THE LAST 3 YRS (QUICK QUOTE) : 0
YEAR LICENSED : 1965	CDL DATE LICENSE :
RELATIONSHIP : CORPORATE OFFICER	
<hr/>	
LICENSE NO : K624185473210	LICENSE STATE : FL
FIRST NAME : DONALD	LAST NAME : KIRKLAND
DATE OF BIRTH : 09/01/1947	INCIDENTS IN THE LAST 3 YRS (QUICK QUOTE) : 0
YEAR LICENSED : 1963	CDL DATE LICENSE :
RELATIONSHIP : EMPLOYEE	
<hr/>	
LICENSE NO : P400017678270	LICENSE STATE : FL
FIRST NAME : ANGELA	LAST NAME : POOLE
DATE OF BIRTH : 09/07/1967	INCIDENTS IN THE LAST 3 YRS (QUICK QUOTE) : 0
YEAR LICENSED : 1985	CDL DATE LICENSE :
RELATIONSHIP : EMPLOYEE	
<hr/>	
LICENSE NO : S426539628270	LICENSE STATE : FL
FIRST NAME : LAURA	LAST NAME : SLOCUMB
DATE OF BIRTH : 09/07/1962	INCIDENTS IN THE LAST 3 YRS (QUICK QUOTE) : 0
YEAR LICENSED : 1978	CDL DATE LICENSE :
RELATIONSHIP : EMPLOYEE	

POLICY AUTOMOBILE RATING FORMULAS

WAIVER OF SUB	Base Rate = 0		Final Premium INCL.
	ADDL FACTORS:	BASE LCM 1.00000	
FELLOW EMPLOYEE COV	Base Rate = 0		Final Premium INCL.
	ADDL FACTORS:	BASE LCM 1.00000	

STATE (FL) LEVEL INFORMATION

RATE REV DT : 10/14/14	LIAB EXP : 2,636.00	PHYS DAM EXP: 1,654.00
DEV REV DT : 07/21/15	CMPST PCENT :	
STATE : FL	TAX DIST :	STATE TERR : 110
NON-OWNED :	EMPL ADD'L : NO	PNOL :
SOC. SERVICE :	SOC SERV VOL:	EXT BLKT IND :
POL TYPE : AUTO		
LIAB DED :	DED AMOUNT :	ILF OVRD :
XS HIRED :	PRIM HIRED :	
HIRED COMP :	HIRED SCL :	HIRED COLL :
HI COMP DED :	HI SCL DED :	HI COLL DED :
		PRIMARY : NO
RENTAL COMP :	RENTAL SCOL :	RENTAL COLL :
RNTL COMP DED:	RNTL SCL DED:	RNTL COLL DED:
MED PAY :		
PIP LIMIT : 10,000	ADD'L PIP :	
WORK LOSS : NO	MED EX :	
PIP DED :		
PIP MISC 1 : NO	PIP MISC 2 :	PIP MISC 3 :
PIP MISC 4 :	BRD/PIP :	BRD ADD'L : NO
UM/UIM TYPE : CSL		
UM CSL : 300,000	UM BI :	UM PD :
UIM CSL : 300,000	UIM BI :	UIM PD :
INDIVIDUAL : NO	UIM REJECT : NO	UM MISC : YES
		UM ADD-On :
DOC TOT INDIV:	DOC MED LIM :	DOC NO-FLT : NO
DOC LIAB CSL :	DOC LIAB BI :	DOC LIAB PD :
DOC UM CSL :	DOC UM BI :	DOC UM PD :
DOC UIM CSL :	DOC UIM BI :	DOC UIM PD :
DOC UIM REJCT: NO	DOC UM MISC : NO	DOWNTIME LIM:
POLL DESC :		
POLL CHARGE :	POLL SURCHG :	
ATTY FEES :	POWER UNITS :	
DEATH BEN COV:	MISC :	RENTAL COVG :
DISAB/INCOME :	# PERSONS :	TX WAIVER :
PREM DISCOUNT:	NY MUNICIPAL :	SIR TYPE :
VOL LIAB :	VOL PHYS DAM:	VOL BDS EDUC:
WC APPLY :	WAIVER TRANS:	
GKL TYPE :		GKLL ALL PERILS :
GKL COMP LIM :	GKL COMP DED:	GKL SCL LIM :
GKL SCL DED :	GKL COLL LIM:	GKL COLL DED:
TI COMP VAL :	TI SCOL VAL :	TI COLL VAL :
TI COMP DED :	TI SCOL DED :	TI COLL DED :
TI RADIUS :	TI ZONE TERR:	
AVG DRVR LIAB:	AVG DRVR PHY:	

PAGE: 2  
NAMED INSURED : HIGGENBOTHAM AUCTIONEERS INTER  
CUSTOMER ID : 688931  
POLICY NUMBER : 648189230  
TRANSACTION TYPE : ENDORSEMENT #2 EFFECTIVE: 01/11/16

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STATE (FL) AUTOMOBILE RATING FORMULAS

\*\*\*\* AUTOMOBILE VEHICLE (1) INFORMATION \*\*\*\*

STATE/VEH# : FL/1 RATE REV DT: 10/14/14 LIAB EXP RATING : 1,003.00  
 REG STATE : FL DEV REV DT : 07/21/15 PHYS DAM EXP RATING: 512.00  
 CITY/CNTY : LAKELAND AUTO TERR : 110  
 TOWN CODE : COUNTY CODE: 105  
 ZIP CODE : 33803 TAX DIST :

CLASS CODE : 032990 VEH TYPE : 03 TRUCKS (INCL P/U & PANELS)  
 POLICY TYPE: PKG DESC : PORTFOLIO : ALLSTATE INSURANCE COMPAN  
 SEQ ID : 1

VEH DESC : FORD  
 F-250  
 SECONDARY DES: ALL OTHERS  
 VEH YEAR : 2008 VEH ACT. AGE : 8 VEH ID NO : 1FTSW21R08EA64053  
 VEH SIZE : LIGHT 9400 VEHICLE USE : COMMERCIAL DUMP OPER : NO  
 VEH RADIUS : INTERMEDIATE/51-200 MILES ZONE TERR : DRIVER CLASS :  
 SEAT CAP : VAN POOL : EXTRA INFO :  
 PPT USE : PPT EXPR : MAKE CODE :  
 MISC INFO 1 : MISC INFO 2 : MISC INFO 3 : N  
 PASSIVE REST.: MANUAL BELTS W/DUAL AIR BAGS ANTI-LOCK : ABS W/4 WHEEL DISC  
 CAR SERVICE : OWNER-OPER : MECH LIFT :

-----AUTOMOBILE VEHICLE (1) COVERAGE INFORMATION-----

LIABILITY : YES	PIP COV : YES	ADDED PIP : NO	OPER : NO
MED PAY : NO	MED LIM OVRD : NO	BOBTAIL OPERS: NO	NY SPOUSAL : NO
DEATH BENE : NO	DISAB/EXT MP : NO	PASS REST : NO	
UM COV : YES	UIM REJCT OVR: NO	INDV/CPLE : NO	UM MISC : NO
UM CSL OVR :	UM BI OVR :	UM PD OVR :	
UIM CSL OVR :	UIM BI OVR :	UIM PD OVR :	
LIAB OVRD :	LIAB LIM OVR :		LIAB PD OVRD :
COMP : YES	VALUATION : ACV	VEH VALUE : 28,840	SYMBOL :
COMP DED : 500	MISC COMP 1 :	MISC COMP 2 :	
SPEC PERIL :	VALUATION :	VEH VALUE :	SYMBOL :
SP DED :	MISC SP :		
COLLISION : YES	VALUATION : ACV	VEH VALUE : 28,840	SYMBOL :
COLL DED : 500	MISC COLL 1 :	MISC COLL 2 :	IN-TOW LIMIT :
TOWING : NO	TOW LIMIT :	LEASE AUTO :	IN-TOW COMP DED:
RENTAL COV :	MAX AMT :	MAX DAYS :	IN-TOW COLL DED:
SOUND LIM :	TAPES/RECS :		COMB DED COV :
MOBILE HOME :	PERILS :	CONT LMTS :	COMB DED :
VEH EFF DATE : 09/01/15	VEH EXP DATE :		LEASE/GAP : YES
CONTINGENT LIAB :	PRIM FAC OVRD:		CARGO COV :
VOL BUYBACK COV :	DEF DRIVE DT :		SPEC EQUIP COST:
ACCD PREV : NO			

-----VEH # 1 AUTOMOBILE RATING FORMULAS-----

COVERAGE

Liability	Loss Cost * Increased Limit * Primary Fct * Early Signing Discount *	
	466 1.880 1.283 .93	
	Exp Group Rating Fct EGR * Policy Tier * Preferred Policy Discount * SIC Rating Factor *	
	1.031 1.09 .80 1.044	
	Veh or Driver Rating Fct * Years in Business Disc * Billing Tier Factor *	
	1.15 .95 .95	
	AntiLock Brake Discount * Driver Profile Rating Fct * LCM = Base Rate =	Final Premium
	.90 1.116 1.843 1885	1885.00
No-Fault/PIP	Loss Cost * Primary Fct * Early Signing Discount * Exp Group Rating Fct EGR * Policy Tier *	
	20 .90 .93 .782 1.09	
	Preferred Policy Discount * SIC Rating Factor * Veh or Driver Rating Fct *	
	.80 1.322 1.15	
	Passive Restraint Disc * Years in Business Disc * Billing Tier Factor *	
	.70 .95 .95	
	Driver Profile Rating Fct * LCM = Base Rate =	Final Premium
	.96 9.653 102	102.00
UM/UIM (BI/CSL)	Loss Cost * LCM = Base Rate =	Final Premium
	142.47 1.805 257	257.00
Comprehensive	Loss Cost * Orig Cost New * Age Factor = Final Base Rate * Primary Fct *	
	113 1.30 .65 95.49 1.30	
	Early Signing Discount * Exp Group Rating Fct EGR * Policy Tier *	
	.93 .967 1.05	
	Preferred Policy Discount * SIC Rating Factor * Veh or Driver Rating Fct *	
	.80 1.083 1.15	
	Years in Business Disc * Billing Tier Factor * Driver Profile Rating Fct * LCM = Base Rate =	Final Premium
	.95 .95 .959 1.988 201	201.00

-----VEH # 1 RATING FORMULAS (CONTINUED)-----

COVERAGE

Collision	$  \begin{aligned}  & \text{Loss Cost} * \text{Orig Cost New} * \text{Age Factor} = \text{Final Base Rate} * \text{Primary Fct} * \\  & 143 \quad 1.35 \quad .56 \quad 108.11 \quad 1.20 \\  & \text{Early Signing Discount} * \text{Exp Group Rating Fct} \quad \text{EGR} * \text{Policy Tier} * \\  & .93 \quad .882 \quad 1.08 \\  & \text{Preferred Policy Discount} * \text{SIC Rating Factor} * \text{Veh or Driver Rating Fct} * \\  & .80 \quad 1.299 \quad 1.12 \\  & \text{Years in Business Disc} * \text{Billing Tier Factor} * \text{Driver Profile Rating Fct} * \\  & .95 \quad .95 \quad 1.086 \\  & \text{AntiLock Brake Discount} * \text{LCM} = \text{Base Rate} = \\  & .90 \quad 2.635 \quad 311  \end{aligned}  $	Final Premium 311.00
Loan/Lease Gap Comp	$  \begin{aligned}  & \text{Base Rate} * \text{Misc Adj} = \\  & 201 \quad .000  \end{aligned}  $	Final Premium INCL.
Loan/Lease Gap Coll	$  \begin{aligned}  & \text{Base Rate} * \text{Misc Adj} = \\  & 311 \quad .000  \end{aligned}  $	Final Premium INCL.

-----VEH (1) LIAB TOTAL = 2,244.00 VEH (1) PHY DMG TOTAL = 512.00-----  
 -----VEHICLE (1) TOTAL PREMIUM = 2,756.00-----

\*\*\*\* AUTOMOBILE VEHICLE (2) INFORMATION \*\*\*\*

STATE/VEH# : FL/2 RATE REV DT: 10/14/14 LIAB EXP RATING : 878.00  
 REG STATE : FL DEV REV DT : 07/21/15 PHYS DAM EXP RATING: 437.00  
 CITY/CNTY : LAKELAND AUTO TERR : 110  
 TOWN CODE : COUNTY CODE: 105  
 ZIP CODE : 33803 TAX DIST :

CLASS CODE : 031990 VEH TYPE : 03 TRUCKS (INCL P/U & PANELS)  
 POLICY TYPE: PKG DESC : PORTFOLIO : ALLSTATE INSURANCE COMPAN  
 SEQ ID : 2

VEH DESC : FORD EXPEDITION  
 SECONDARY DES: ALL OTHERS  
 VEH YEAR : 2006 VEH ACT. AGE : 10 VEH ID NO : 1FMPU18516LA12380  
 VEH SIZE : LIGHT 7300 VEHICLE USE : COMMERCIAL DUMP OPER : NO  
 VEH RADIUS : LOCAL/0-50 MILES ZONE TERR : DRIVER CLASS :  
 SEAT CAP : VAN POOL : EXTRA INFO :  
 PPT USE : PPT EXPR : MAKE CODE :  
 MISC INFO 1 : MISC INFO 2 : MISC INFO 3 : N  
 PASSIVE REST.: MANUAL BELTS W/DUAL AIR BAGS ANTI-LOCK : ABS W/4 WHEEL DISC  
 CAR SERVICE : OWNER-OPER : MECH LIFT :

-----AUTOMOBILE VEHICLE (2) COVERAGE INFORMATION-----

LIABILITY : YES	PIP COV : YES	ADDED PIP : NO	OPER : NO
MED PAY : NO	MED LIM OVRD : NO	BOBTAIL OPERS: NO	NY SPOUSAL : NO
DEATH BENE : NO	DISAB/EXT MP : NO	PASS REST : NO	
UM COV : YES	UIM REJECT OVR: :	INDV/CPLD : NO	UM MISC : NO
UM CSL OVR :	UM BI OVR :	UM PD OVR :	
UIM CSL OVR :	UIM BI OVR :	UIM PD OVR :	
LIAB OVRD :	LIAB LIM OVR :		LIAB PD OVRD :
COMP : YES	VALUATION : ACV	VEH VALUE : 42,905	SYMBOL :
COMP DED : 500	MISC COMP 1 :	MISC COMP 2 :	
SPEC PERIL :	VALUATION :	VEH VALUE :	SYMBOL :
SP DED :	MISC SP :		
COLLISION : YES	VALUATION : ACV	VEH VALUE : 42,905	SYMBOL :
COLL DED : 500	MISC COLL 1 :	MISC COLL 2 :	IN-TOW LIMIT :
TOWING : NO	TOW LIMIT :	LEASE AUTO :	IN-TOW COMP DED:
RENTAL COV :	MAX AMT :	MAX DAYS :	IN-TOW COLL DED:
SOUND LIM :	TAPES/RECS :		COMB DED COV :
MOBILE HOME :	PERILS :	CONT LMTS :	COMB DED :
VEH EFF DATE : 09/01/15	VEH EXP DATE :		LEASE/GAP : YES
CONTINGENT LIAB :	PRIM FAC OVRD:		CARGO COV :
VOL BUYBACK COV :	DEF DRIVE DT :		SPEC EQUIP COST:
ACCD PREV : NO			

-----VEH # 2 AUTOMOBILE RATING FORMULAS-----

COVERAGE

Liability	Loss Cost * Increased Limit * Primary Fct * Early Signing Discount *	
	466 1.880 1.05 .93	
	Exp Group Rating Fct EGR * Policy Tier * Preferred Policy Discount * SIC Rating Factor *	
	1.103 1.09 .80 1.044	
	Veh or Driver Rating Fct * Years in Business Disc * Billing Tier Factor *	
	1.15 .95 .95	
	AntiLock Brake Discount * Driver Profile Rating Fct * LCM = Base Rate =	Final Premium
	.90 1.116 1.843 1650	1650.00
No-Fault/PIP	Loss Cost * Primary Fct * Early Signing Discount * Exp Group Rating Fct EGR * Policy Tier *	
	20 .95 .93 1.109 1.09	
	Preferred Policy Discount * SIC Rating Factor * Veh or Driver Rating Fct *	
	.80 1.322 1.15	
	Passive Restraint Disc * Years in Business Disc * Billing Tier Factor *	
	.70 .95 .95	
	Driver Profile Rating Fct * LCM = Base Rate =	Final Premium
	.96 9.653 152	152.00
UM/UIM (BI/CSL)	Loss Cost * LCM = Base Rate =	Final Premium
	142.47 1.805 257	257.00
Comprehensive	Loss Cost * Orig Cost New * Age Factor = Final Base Rate * Primary Fct *	
	113 1.55 .57 99.84 .95	
	Early Signing Discount * Exp Group Rating Fct EGR * Policy Tier *	
	.93 .848 1.05	
	Preferred Policy Discount * SIC Rating Factor * Veh or Driver Rating Fct *	
	.80 1.083 1.15	
	Years in Business Disc * Billing Tier Factor * Driver Profile Rating Fct * LCM = Base Rate =	Final Premium
	.95 .95 .959 1.988 135	135.00

VEH # 2 RATING FORMULAS (CONTINUED)

COVERAGE

Collision	$  \begin{aligned}  & \text{Loss Cost} * \text{Orig Cost New} * \text{Age Factor} = \text{Final Base Rate} * \text{Primary Fct} * \\  & 143 \quad 1.90 \quad .47 \quad 127.70 \quad .95 \\  & \text{Early Signing Discount} * \text{Exp Group Rating Fct} \quad \text{EGR} * \text{Policy Tier} * \\  & .93 \quad .917 \quad 1.08 \\  & \text{Preferred Policy Discount} * \text{SIC Rating Factor} * \text{Veh or Driver Rating Fct} * \\  & .80 \quad 1.299 \quad 1.12 \\  & \text{Years in Business Disc} * \text{Billing Tier Factor} * \text{Driver Profile Rating Fct} * \\  & .95 \quad .95 \quad 1.086 \\  & \text{AntiLock Brake Discount} * \text{LCM} = \text{Base Rate} = \\  & .90 \quad 2.635 \quad 302  \end{aligned}  $	$  \begin{aligned}  & \text{Final Premium} \\  & 302.00  \end{aligned}  $
Loan/Lease Gap Comp	$  \begin{aligned}  & \text{Base Rate} * \text{Misc Adj} = \\  & 135 \quad .000  \end{aligned}  $	$  \begin{aligned}  & \text{Final Premium} \\  & \text{INCL.}  \end{aligned}  $
Loan/Lease Gap Coll	$  \begin{aligned}  & \text{Base Rate} * \text{Misc Adj} = \\  & 302 \quad .000  \end{aligned}  $	$  \begin{aligned}  & \text{Final Premium} \\  & \text{INCL.}  \end{aligned}  $

VEH (2) LIAB TOTAL = 2,059.00 VEH (2) PHY DMG TOTAL = 437.00

VEHICLE (2) TOTAL PREMIUM = 2,496.00

\*\*\*\* AUTOMOBILE VEHICLE (3) INFORMATION \*\*\*\*

STATE/VEH# : FL/3 RATE REV DT: 10/14/14 LIAB EXP RATING : 755.00  
 REG STATE : FL DEV REV DT : 07/21/15 PHYS DAM EXP RATING: 593.00  
 CITY/CNTY : LAKELAND AUTO TERR : 110  
 TOWN CODE : COUNTY CODE: 105  
 ZIP CODE : 33803 TAX DIST :

CLASS CODE : 739100 VEH TYPE : 02 PRIVATE PASS. NON-FLEET  
 POLICY TYPE: PKG DESC : PORTFOLIO : ALLSTATE INSURANCE COMPAN  
 SEQ ID : 4

VEH DESC : VOLKSWAGEN  
 PASSAT  
 VEH YEAR : 2012 VEH ACT. AGE : 4 VEH ID NO : 1VWCN7A32CC098433  
 VEH SIZE : VEHICLE USE : DUMP OPER :  
 VEH RADIUS : ZONE TERR : DRIVER CLASS :  
 SEAT CAP : VAN POOL : EXTRA INFO :  
 PPT USE : PPT EXPER : MAKE CODE :  
 MISC INFO 1 : MISC INFO 2 : MISC INFO 3 :  
 PASSIVE REST.: MAN.BELTS W/DUAL & SIDE AIR BAGS ANTI-LOCK : ABS W/4 WHEEL DISC  
 CAR SERVICE : OWNER-OPER : MECH LIFT :

-----AUTOMOBILE VEHICLE (3) COVERAGE INFORMATION-----

LIABILITY : YES PIP COV : YES ADDED PIP : NO OPER : NO  
 MED PAY : NO MED LIM OVRD : BOBTAIL OPERS: NO NY SPOUSAL : NO  
 DEATH BENE : NO DISAB/EXT MP : NO PASS REST :  
 UM COV : YES UIM REJCT OVR: INDV/CPL : NO UM MISC : NO  
 UM CSL OVR : UM BI OVR : UM PD OVR :  
 UIM CSL OVR : UIM BI OVR : UIM PD OVR :  
 LIAB OVRD : LIAB LIM OVR : LIAB PD OVRD :  
 COMP : YES VALUATION : ACV VEH VALUE : 32,195 SYMBOL :  
 COMP DED : 500 MISC COMP 1 : MISC COMP 2 :  
 SPEC PERIL : VALUATION : VEH VALUE : SYMBOL :  
 SP DED : MISC SP : VEH VALUE : 32,195 SYMBOL :  
 COLLISION : YES VALUATION : ACV MISC COLL 2 : IN-TOW LIMIT :  
 COLL DED : 500 MISC COLL 1 : LEASE AUTO : IN-TOW COMP DED:  
 TOWING : TOW LIMIT : MAX DAYS : IN-TOW COLL DED:  
 RENTAL COV : MAX AMT : CONT LMTS : COMB DED COV :  
 SOUND LIM : TAPES/RECS : PERILS : COMB DED :  
 MOBILE HOME : PERILS : VEH EXP DATE : LEASE/GAP : YES  
 VEH EFF DATE : 09/01/15 VEH EXP DATE : PRIM FAC OVRD: CARGO COV :  
 CONTINGENT LIAB : DEF DRIVE DT : DEF DRIVE DT : SPEC EQUIP COST:  
 VOL BUYBACK COV : ACCD PREV : NO

-----VEH # 3 AUTOMOBILE RATING FORMULAS-----

COVERAGE

Liability Loss Cost \* Increased Limit \* Early Signing Discount \* Exp Group Rating Fct EGR \*  
 500 2.000 .93 1.039  
 Policy Tier \* Preferred Policy Discount \* SIC Rating Factor \* Veh or Driver Rating Fct \*  
 1.09 .80 1.044 1.15  
 Years in Business Disc \* Billing Tier Factor \* AntiLock Brake Discount \*  
 .95 .95 .90  
 Driver Profile Rating Fct \* LCM = Base Rate = Final Premium  
 1.116 1.647 1510 1510.00

No-Fault/PIP Loss Cost \* Early Signing Discount \* Policy Tier \* Preferred Policy Discount \*  
 30 .93 1.09 .80  
 SIC Rating Factor \* Veh or Driver Rating Fct \* Passive Restraint Disc \*  
 1.322 1.15 .70  
 Years in Business Disc \* Billing Tier Factor \* Driver Profile Rating Fct \* LCM = Base Rate = Final Premium  
 .95 .95 .96 6.199 139 139.00

UM/UIM (BI/CSL) Loss Cost \* LCM = Base Rate = Final Premium  
 214.42 1.456 312 312.00

Comprehensive Loss Cost \* Orig Cost New \* Age Factor = Final Base Rate \* Early Signing Discount \*  
 49 1.25 .76 46.55 .93  
 Exp Group Rating Fct EGR \* Policy Tier \* Preferred Policy Discount \* SIC Rating Factor \*  
 1.024 1.05 .80 1.083  
 Veh or Driver Rating Fct \* Years in Business Disc \* Billing Tier Factor \*  
 1.15 .95 .95  
 Driver Profile Rating Fct \* LCM = Base Rate = Final Premium  
 .959 3.723 149 149.00

VEH # 3 RATING FORMULAS (CONTINUED)

COVERAGE

Collision	Loss Cost * Orig Cost New * Age Factor = Final Base Rate * Early Signing Discount * 209 1.10 .74 170.13 .93 Exp Group Rating Fct EGR * Policy Tier * Preferred Policy Discount * SIC Rating Factor * 1.312 1.08 .80 1.299 Veh or Driver Rating Fct * Years in Business Disc * Billing Tier Factor * 1.12 .95 .95 Driver Profile Rating Fct * AntiLock Brake Discount * LCM = Base Rate = 1.086 .90 1.929 444	Final Premium 444.00
Loan/Lease Gap Comp	Base Rate * Misc Adj = 149 .000	Final Premium INCL.
Loan/Lease Gap Coll	Base Rate * Misc Adj = 444 .000	Final Premium INCL.

VEH (3) LIAB TOTAL = 1,961.00 VEH (3) PHY DMG TOTAL = 593.00  
 VEHICLE (3) TOTAL PREMIUM = 2,554.00

\*\*\*\* AUTOMOBILE VEHICLE (4) INFORMATION \*\*\*\*

STATE/VEH# : FL/4                      RATE REV DT: 10/14/14                      LIAB EXP RATING :  
 REG STATE : FL                      DEV REV DT : 07/21/15                      PHYS DAM EXP RATING: 58.00  
 CITY/CNTY : LAKELAND                      AUTO TERR : 110  
 TOWN CODE :                      COUNTY CODE: 105  
 ZIP CODE : 33803                      TAX DIST :  
 CLASS CODE : 692990                      VEH TYPE : 07 SERVICE/UTILITY TRAILER  
 POLICY TYPE:                      PKG DESC :                      PORTFOLIO : ALLSTATE INSURANCE COMPAN  
 SEQ ID : 5  
 VEH DESC : PAGE  
    TRAILER  
 SECONDARY DES: ALL OTHERS  
 VEH YEAR : 2006                      VEH ACT. AGE : 10                      VEH ID NO : 4FPWB242X6G113167  
 VEH SIZE :                      VEHICLE USE :                      DUMP OPER : NO  
 VEH RADIUS : INTERMEDIATE/51-200 MILES                      ZONE TERR :                      DRIVER CLASS :  
 SEAT CAP :                      VAN POOL :                      EXTRA INFO :  
 PPT USE :                      PPT EXPER :                      MAKE CODE :  
 MISC INFO 1 :                      MISC INFO 2 :                      MISC INFO 3 :  
 PASSIVE REST.:                      ANTI-LOCK :  
 CAR SERVICE :                      OWNER-OPER :                      MECH LIFT :

-----AUTOMOBILE VEHICLE (4) COVERAGE INFORMATION-----

LIABILITY : YES                      PIP COV : YES                      ADDED PIP : NO                      OPER : NO  
 MED PAY : NO                      MED LIM OVRD :                      BOBTAIL OPERS: NO                      NY SPOUSAL : NO  
 DEATH BENE : NO                      DISAB/EXT MP : NO                      PASS REST :                      UM MISC : NO  
 UM COV : YES                      UIM REJCT OVR:                      INDV/CPL : NO  
 UM CSL OVR :                      UM BI OVR :                      UM PD OVR :  
 UIM CSL OVR :                      UIM BI OVR :                      UIM PD OVR :  
 LIAB OVRD :                      LIAB LIM OVR :                      LIAB PD OVRD :  
 COMP : YES                      VALUATION : ACV                      VEH VALUE : 6,000                      SYMBOL :  
 COMP DED : 500                      MISC COMP 1 :                      MISC COMP 2 :                      VEH VALUE :  
 SPEC PERIL :                      VALUATION :                      VEH VALUE :                      SYMBOL :  
 SP DED :                      MISC SP :                      VEH VALUE : 6,000                      SYMBOL :  
 COLLISION : YES                      VALUATION : ACV                      MISC COLL 2 :                      IN-TOW LIMIT :  
 COLL DED : 500                      MISC COLL 1 :                      LEASE AUTO :                      IN-TOW COMP DED:  
 TOWING : NO                      TOW LIMIT :                      MAX DAYS :                      IN-TOW COLL DED:  
 RENTAL COV :                      MAX AMT :                      CONT LMTS :                      COMB DED COV :  
 SOUND LIM :                      TAPES/RECS :                      VEH EXP DATE :                      COMB DED :  
 MOBILE HOME :                      PERILS :                      PRIM FAC OVRD:                      LEASE/GAP : YES  
 VEH EFF DATE : 09/01/15                      DEF DRIVE DT :                      CARGO COV :  
 CONTINGENT LIAB :                      LEASE/GAP : YES                      SPEC EQUIP COST:  
 VOL BUYBACK COV :                      CARGO COV :  
 ACCD PREV : NO                      SPEC EQUIP COST:

-----VEH # 4 AUTOMOBILE RATING FORMULAS-----

COVERAGE

Comprehensive	Loss Cost	* Orig Cost	New * Age Factor =	Final Base Rate	* Primary Fct	* LCM = Base Rate =	Final Premium
	113	.65	.57	41.87	.45	1.988 37	37.00
Collision	Loss Cost	* Orig Cost	New * Age Factor =	Final Base Rate	* Primary Fct	* LCM = Base Rate =	Final Premium
	143	.40	.47	26.88	.30	2.635 21	21.00
Loan/Lease Gap Comp	Base Rate	* Misc Adj =					Final Premium
	37	.000					INCL.
Loan/Lease Gap Coll	Base Rate	* Misc Adj =					Final Premium
	21	.000					INCL.

-----VEH (4) PHY DMG TOTAL = 58.00-----  
 -----VEHICLE (4) TOTAL PREMIUM = 58.00-----

\*\*\*\* AUTOMOBILE VEHICLE (5) INFORMATION \*\*\*\*

STATE/VEH# : FL/5	RATE REV DT: 10/14/14	LIAB EXP RATING :
REG STATE : FL	DEV REV DT : 07/21/15	PHYS DAM EXP RATING: 54.00
CITY/CNTY : LAKELAND	AUTO TERR : 110	
TOWN CODE :	COUNTY CODE: 105	
ZIP CODE : 33803	TAX DIST :	
CLASS CODE : 691990	VEH TYPE : 07 SERVICE/UTILITY TRAILER	PORTFOLIO : ALLSTATE INSURANCE COMPAN
POLICY TYPE:	PKG DESC :	
SEQ ID : 6		
VEH DESC : KOUNTRY KUSTOMS TRAILER		
SECONDARY DES: ALL OTHERS		
VEH YEAR : 2010	VEH ACT. AGE : 6	VEH ID NO : 1K9BU292XA1236591
VEH SIZE :	VEHICLE USE :	DUMP OPER : NO
VEH RADIUS : LOCAL/0-50 MILES	ZONE TERR :	DRIVER CLASS :
SEAT CAP :	VAN POOL :	EXTRA INFO :
PPT USE :	PPT EXFER :	MAKE CODE :
MISC INFO 1 :	MISC INFO 2 :	MISC INFO 3 :
PASSIVE REST.:		ANTI-LOCK :
CAR SERVICE :	OWNER-OPER :	MECH LIFT :

AUTOMOBILE VEHICLE (5) COVERAGE INFORMATION

LIABILITY : YES	PIP COV : YES	ADDED PIP : NO	OPER : NO
MED PAY : NO	MED LIM OVRD : NO	BOBTAIL OPERS: NO	NY SPOUSAL : NO
DEATH BENE : NO	DISAB/EXT MP : NO	PASS REST : NO	
UM COV : YES	UIM REJCT OVR: NO	INDV/CPL : NO	UM MISC : NO
UM CSL OVR :	UM BI OVR :	UM PD OVR :	
UIM CSL OVR :	UIM BI OVR :	UIM PD OVR :	
LIAB OVRD :	LIAB LIM OVR :		LIAB PD OVRD :
COMP : YES	VALUATION : ACV	VEH VALUE : 7,000	SYMBOL :
COMP DED : 500	MISC COMP 1 :	MISC COMP 2 :	
SPEC PERIL :	VALUATION :	VEH VALUE :	SYMBOL :
SP DED :	MISC SP :		
COLLISION : YES	VALUATION : ACV	VEH VALUE : 7,000	SYMBOL :
COLL DED : 500	MISC COLL 1 :	MISC COLL 2 :	IN-TOW LIMIT :
TOWING : NO	TOW LIMIT :	LEASE AUTO :	IN-TOW COMP DED:
RENTAL COV :	MAX AMT :	MAX DAYS :	IN-TOW COLL DED:
SOUND LIM :	TAPES/RECS :		COMB DED COV :
MOBILE HOME :	PERILS :	CONT LMTS :	COMB DED :
VEH EFF DATE : 09/01/15	VEH EXP DATE :		LEASE/GAP : YES
CONTINGENT LIAB :	PRIM FAC OVRD:		CARGO COV :
VOL BUYBACK COV :	DEF DRIVE DT :		SPEC EQUIP COST:
ACCD PREV : NO			

VEH # 5 AUTOMOBILE RATING FORMULAS

COVERAGE									
Comprehensive	Loss Cost	* Orig Cost	New * Age Factor	= Final Base Rate	* Primary Fct	* LCM = Base Rate	=	Final Premium	
	113	.75	.74	62.72	.30	1.988	37	37.00	
Collision	Loss Cost	* Orig Cost	New * Age Factor	= Final Base Rate	* Primary Fct	* LCM = Base Rate	=	Final Premium	
	143	.45	.66	42.47	.15	2.635	17	17.00	
Loan/Lease Gap Comp	Base Rate	* Misc Adj	=					Final Premium	
	37	.000						INCL.	
Loan/Lease Gap Coll	Base Rate	* Misc Adj	=					Final Premium	
	17	.000						INCL.	

VEH (5) PHY DMG TOTAL = 54.00  
 VEHICLE (5) TOTAL PREMIUM = 54.00

NAMED INSURED : HIGGENBOTHAM AUCTIONEERS INTER  
CUSTOMER ID : 688931  
POLICY NUMBER : 648189230  
TRANSACTION TYPE : ENDORSEMENT #2 EFFECTIVE: 01/11/16

---

(FL) LIAB TOTAL = 6,264.00 (FL) PHY DMG TOTAL = 1,654.00  
(FL) TOTAL PREMIUM = 7,918.00

---

---

POLICY LIAB TOTAL = 6,264.00 POLICY PHY DMG TOTAL = 1,654.00  
POLICY TOTAL PREMIUM = 7,918.00

---



# HIGGENBOTHAM AUCTIONEERS

INTERNATIONAL, LTD., INC

*The name that sells!*

## CERTIFICATIONS OF TRAINING

The following personnel hold the following certificates of training. These certificates are encased in wall plaques which hang on our office walls and therefore cannot be duplicated. If the City of Fort Pierce needs to verify these, we have given telephone numbers and web addresses of the training entities involved for verification.

Martin E. Higgenbotham: Certified Auctioneers Institute (CAI)  
Accredited Auctioneer of Real Estate (AARE)  
Member, Hall of Fame  
National Auctioneers Association  
Overland Park, KS  
(913) 541-8084  
[www.auctioneers.org](http://www.auctioneers.org)

Christopher M. Vaughan B.S. – Finance  
California State University, Long Beach  
Long Beach, CA  
(562) 985-4121  
[www.csulb.edu](http://www.csulb.edu)

M.B.A. – Real Estate & Urban Development  
Golden Gate University, San Francisco  
San Francisco, CA  
(415) 442-7800  
[www.ggu.edu](http://www.ggu.edu)

Accredited Auctioneer of Real Estate (AARE)  
National Auctioneers Association  
Overland Park, KS  
(913) 541-8084  
[www.auctioneers.org](http://www.auctioneers.org)

Professional Ringmen's Institute (PRI)  
Springfield, MO  
(417) 753-7653  
[www.proringmen.com](http://www.proringmen.com)

Donald G. Gabriel B.S. Marketing  
University of California, Los Angeles  
Los Angeles, CA  
(310) 825-1091  
[www.ucla.edu](http://www.ucla.edu)

Donald G. Gabriel (Cont.)

Certified Commercial-Investment Member (CCIM)  
National Association of Realtors  
Chicago, IL  
(312) 321-4460  
[www.ccim.com](http://www.ccim.com)

Brett Vogeler

B.S. – Mechanical Engineering  
Iowa State University  
Ames, Iowa  
(515) 294-4111  
[www.iastate.edu](http://www.iastate.edu)

## Request for Taxpayer Identification Number and Certification

**Give Form to the  
requester. Do not  
send to the IRS.**

Print or type See Specific Instructions on page 2.	1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank. <b>Higgenbotham Auctioneers International Limited, Inc.</b>		
	2 Business name/disregarded entity name, if different from above		
	3 Check appropriate box for federal tax classification; check only <b>one</b> of the following seven boxes: <input type="checkbox"/> Individual/sole proprietor or single-member LLC <input type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=partnership) ▶ _____ <b>Note.</b> For a single-member LLC that is disregarded, do not check LLC; check the appropriate box in the line above for the tax classification of the single-member owner. <input type="checkbox"/> Other (see instructions) ▶ _____		4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <i>(Applies to accounts maintained outside the U.S.)</i>
	5 Address (number, street, and apt. or suite no.) <b>5900 Imperial Lakes Boulevard</b>		Requester's name and address (optional)
	6 City, state, and ZIP code <b>Mulberry, FL 33860</b>		<b>City of Fort Pierce</b> <b>P.O. Box 1480</b> <b>Fort Pierce, FL 34954-1480</b>
	7 List account number(s) here (optional)		

### Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

<b>Social security number</b>										

**Note.** If the account is in more than one name, see the instructions for line 1 and the chart on page 4 for guidelines on whose number to enter.

**or**

<b>Employer identification number</b>										
5	9		-	3	0	7	2	5	4	7

### Part II Certification

Under penalties of perjury, I certify that:

1. The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
3. I am a U.S. citizen or other U.S. person (defined below); and
4. The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions on page 3.

<b>Sign Here</b>	Signature of U.S. person ▶ <i>Martin E Higgenbotham</i>	Date ▶ <i>1/11/16</i>
------------------	---	-----------------------

### General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

**Future developments.** Information about developments affecting Form W-9 (such as legislation enacted after we release it) is at [www.irs.gov/fw9](http://www.irs.gov/fw9).

#### Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following:

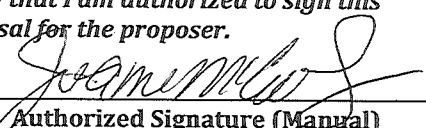
- Form 1099-INT (interest earned or paid)
- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)

- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

*If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What is backup withholding? on page 2.*

- By signing the filled-out form, you:
1. Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
  2. Certify that you are not subject to backup withholding, or
  3. Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income, and
  4. Certify that FATCA code(s) entered on this form (if any) indicating that you are exempt from the FATCA reporting, is correct. See *What is FATCA reporting?* on page 2 for further information.

<p><b>DELIVER TO:</b>  City of Fort Pierce  100 North U.S. #1  Fort Pierce, FL 34950</p> <p><b>MAIL TO:</b>  City of Fort Pierce Procurement Dept.  P.O. Box 1480  Fort Pierce, FL 34954-1480</p>	<p><b>REQUEST  FOR  PROPOSALS  and  PROPOSER  ACKNOWLEDGMENT</b></p>
<p>Contact: Gelencia Carter, 772-467-3748</p>	<p>RFP No: 2016-012</p>
<p>Mandatory Pre-Bid Conference Date:  N/A</p>	<p>RFP Title: REAL ESTATE  BROKER SERVICES</p>
<p>Mandatory Pre-Bid Location:  N/A</p>	<p>RFP Opening Location:  City of Ft. Pierce Procurement Dept.  100 North U.S. #1, 1st Floor  Ft. Pierce, Florida 34950</p>
<p>RFP Due Date &amp; Time:  3:00 PM, TUESDAY, JANUARY 12, 2016</p>	<p>If you need any reasonable accommodation for any type of disability in order to participate in this procurement, please contact this department as soon as possible.</p>
<p>Proposer Name:  Joanne McCurdy</p> <p>Mailing Address:  McCurdy &amp; Co. Realty  171 Melody Ln  Fort Pierce, FL 34950</p>	<p>I hereby certify that this proposal is made without prior understanding, agreement, or connection with any corporation, firm, or person submitting a bid for the same materials, supplies or equipment, and is in all respects fair and without collusion or fraud. I agree to abide by all conditions of this bid and certify that I am authorized to sign this proposal for the proposer.</p> <p>X   Authorized Signature (Manual)</p>
<p>City, State, Zip Code: Ft. Pierce, FL 34950</p>	<p>Typed or Printed Name:</p>
<p>Type of Entity (Circle One):  Corporation Partnership Proprietorship</p>	<p>Title:  Broker Owner</p>
<p>Incorporated in the State of: FL Year: 2013</p>	<p>Delivery in _____ days, ARO</p>
<p>Phone Number: 772-242-8136</p>	<p>Payment Terms: Net 30 Days</p>
<p>Fax Number: 772-242-8509</p>	<p>FEIN or SS Number:</p>
<p>E-Mail Address: joannemcurdy@earthlink.net</p>	<p>Local Business: <input checked="" type="checkbox"/> Y <input type="checkbox"/> N MWBE: <input type="checkbox"/> Y <input type="checkbox"/> N</p>
<p>Bid Security is attached, when required, in the amount of \$ _____  F.O.B. DESTINATION</p>	<p>If returning as a "No Bid" state reason: Real Estate Broker Services</p>
<p><b>THIS PAGE MUST BE COMPLETED AND RETURNED WITH YOUR BID</b></p>	



January 10, 2016

To Whom It May Concern,

Thank you for the opportunity to work with the City of Fort Pierce.

I am a Real Estate Broker in St Lucie County, and my office is located in downtown Fort Pierce. I have worked in St. Lucie County selling real estate since 1987 and am very proud to be living and working in Fort Pierce.

I am involved with the Realtors Association as committee member of Governmental Affairs, as a Liaison and Key Contact for the Mayors of Fort Pierce for the last 7 years, also for the Superintendent of Schools and various commissioners. I also served on the Board of Directors for the Realtors Association serving for 2 years and on the Grievance Committee, Broker Round Table, as well as International Affairs. I am also an active member with the Economic Development Council of St. Lucie County.

I tell you this so you will have confidence that I am very involved and committed to the betterment of the City of Fort Pierce.

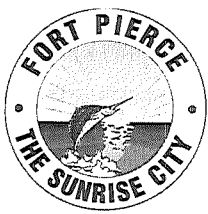
I have had many commercial properties sales over the last more than 25 years, so I have attached just a recent few.

Again, thank you for this opportunity and I would be honored to work with the City of Fort Pierce and assist them with any of their Real Estate Needs.

A handwritten signature in cursive script that reads "Joanne McCurdy".

Joanne McCurdy

171 Melody Lane  
Fort Pierce, Fl. 34950  
772-242-8436 office\*772-242-8509 fax  
[www.mccurdyrealty.com](http://www.mccurdyrealty.com)



# PROPOSER'S QUESTIONNAIRE

RFP #2016-012

Real Estate Broker Services

It is understood and agreed that the following information is to be used by the City of Fort Pierce to determine the qualifications of Proposers to perform the work required. The Proposer waives any claim against the City that might arise with respect to any decision concerning the qualifications of the Proposer.

The undersigned attests to the truth and accuracy of all statements made on this questionnaire. Also, the undersigned hereby authorizes any public official, person, firm or corporation to furnish the City of Fort Pierce any pertinent information requested by the City deemed necessary to vary the information on this questionnaire.

Dated this 11 day of January, 2016.

McCurdy & Co.. Realty/Joanne McCurdy

Name of Organization / Proposer

By: Joanne McCurdy-Broker Owner  
Name and Title

(If more space is needed, please attach additional sheets.)

- 1. Corporation, Partnership, Joint Venture, Individual or other?**  
Corporation
- 2. Firm's name and main office address, telephone and fax number, e-mail:**  
McCurdy & Co. Realty  
171 Melody Lane Fort Pierce, FL 34950  
772.242.8436 772.242.8509  
[joannemccurdy1@aol.com](mailto:joannemccurdy1@aol.com) [www.mccurdyrealty.com](http://www.mccurdyrealty.com)
- 3. Give the names of the person who will be authorized to make decisions and speak as a representative of the Proposer, their titles, addresses and telephone and facsimile numbers.**  
N/A
- 4. Firm's previous names (if any).**  
N/A
- 5. How many years has your organization or individual been in commercial real estate business and locations?**  
Years: 28 Location(s): St. Lucie County

**Licenses:** Real Estate Broker **Certifications:** GRI, CPPE, CRS

6. **Names of personnel (if other than Proposer) that will be performing requested realtor services/work:**

_____	_____	_____
_____	_____	_____
_____	_____	_____

7. **Proposer sale & lease history for properties of 115,000 SQ and above?**  
**Date    Commercial    Sq ft    Location    Sale price    Annual lease    Listing Date**

**This is a word document add lines as needed.**

8. **List training/education of Proposer and Proposer staff that will be assigned to this project:**  
Real Estate Broker License

9. **Provide market and advertising methods.**

MLS, Loopnet, CoStar, Internet Marketing, McCurdy Realty website, Facebook, trulia, realtor.com, brochures, postcards

10. **List knowledge of public real estate records that will be used by your firm.**

Property Tax Records

Multiple Listing Services.

11. **List method(s) use for rent/lease assessment**

Comparative Market Analysis, researching demand, inventory, and improvements.

12. **Method used for background checks.**

Next Step Screening

13. **List marketing strategies used for lease properties**

MLS, Loopnet, CoStar, Internet Marketing, McCurdy Realty website, Facebook, trulia, realtor.com, brochures, postcards

14. **List marketing strategies used for properties for sale**

MLS, Loopnet, CoStar, Internet Marketing, McCurdy Realty website, Facebook, trulia, realtor.com, brochures, postcards

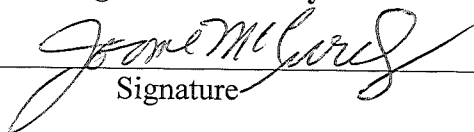
15. **List current and past litigation of your firm within the past five (5) years. N/A**

16. Provide a list of three (3) past clients for this size and type of property

Client name	Telephone#	Email	Property Title
Hans Kraaz	772.464.5885	info@boatloan.com	130 N. 2 <sup>nd</sup> Street
Troy Drawdy	772.464.8160	troy@drawdybrothers.com	2959 Midway Road
Gus Gutierrez	772.801.5729	<u>info@galleriaofpierceharbor.com</u>	Galleria of Pierce Harbor

17. Is your firm a member of Multiple Listing Service (MLS)? Yes

18. Broker agrees to abide by the terms and conditions of the City Contract.


1-11-16 Broker-Owner  
 Signature Title

19. **ADDENDUM ACKNOWLEDGMENT** Proposer acknowledges that the following addenda have been received and are included in his/her proposal:

Addendum Number	Date Issued
1	01/05/16

20. Please enter below the percentage of the NET value (after all expenses) of the lease or sale that your firm will charge for the services that you will be providing. The City will not enter into an open-ended contract. This would be a one-time fee percentage of the new value of the lease or value of the net sale to the City.

Service	Fee
Sale	3% Net value (No co-broker)
Lease	3% Net Value (No co-broker)

Additional Services	Rate
Consulting	\$150.00 Per Hour
BPO	\$150.00 per hour

This is a word document as lines as needed.

January 5, 2016

**CITY OF FORT PIERCE**  
**REAL ESTATE BROKER SERVICES**



**RFP NO. 2016-012**

**ADDENDUM NO. 1**

The purpose of this addendum is to provide modifications and clarifications to the specification as follows:

Section V – *Statement of Work, Proposer’s Questionnaire*, item numbered 7. , has been modified and should read:

7. Proposer sale & lease history of commercial properties? Include the following information:

Date	Commercial Sq. ft.	Location	Sale Price	Annual Lease	Listing Date

*See following pages*

All other conditions of this bid remain the same.

Please acknowledge receipt of this addendum and include it with your submittal.

Signature: *Joanne McCurdy*  
Manual

Signature: *Joanne McCurdy*  
Typed or Printed

Company Name: *McCurdy & Co. Realty*

Address: *171 Melody Lane Ft. Pierce, FL 34950*

Date: *January 12, 2016*

/gc

## Comm/Industry Customer Report

130 N 2nd Street, Fort Pierce, FL 34950

List Price: \$788,000



**List Number:** RX-10168303  
**Area:** 7030  
**Geo Area:** SL08  
**County:** St. Lucie  
**For Sale:** Yes  
**For Lease:** No  
**Subdivision:** AARON LEES  
 MAP OF FORT  
 PIERCE

**Status:** Closed  
**Property:** Commercial  
**Desc:**  
**Parcel ID:** 241050300550009

**List Price:** 788,000  
**Price:**  
**Zoning:** C4

**Property Desc:** Commercial  
**Legal Desc:** AARON LEE'S MAP OF FORT PIERCE BLK G N 95 FT OF LOTS 1  
 AND 2 AND ALL LOT 3 (MAP 24/10B) (OR 3534-2374)  
**Virtual Tour:**

<b>Year Built:</b> 1961	<b>RE Taxes:</b> 14,963.9	<b>Miles to Expressway:</b> 5
<b>Year Built Desc:</b>	<b>Tax Year:</b> 2014	<b>Miles to Beach:</b> 1
<b>Tot Bldg SqFt:</b> 21,708	<b>SqFt Source:</b> Tax Rolls	<b>Type:</b> Commercial Industrial
<b>Total Units:</b> 1		<b># of Stories:</b> 2
<b>Acres:</b> 0.38	<b>Baths - # Toilets:</b> 2	<b># of Meters:</b>
<b>% Air Conditioned:</b> 35	<b>Ann Assoc/Condo Dues:</b>	

**Building Info:** # of Offices: 5; Interior Ceiling Hgt: 18; # of Loading Docks: 1; Miles to Expressway: 5; Miles to Beach: 1

**Auction:** No  
**Directions:**

<b>Avail Docs:</b> None	<b>Possession:</b> At Closing
<b>Avail Info:</b> None	<b>Roof:</b> Mixed
<b>Cooling:</b> Central; Zoned	<b>Sale Includes:</b> Building and Land
<b>Flooring:</b> Concrete; Tile	<b>Type of Building:</b> Commercial; Free Standing; Mini Warehouse; Office/Warehouse; Restaurant; Retail; Shopping Center
<b>Lease:</b> None	<b>Tenant Pays:</b> Electric; Sewer; Taxes; Water
<b>Heating:</b> Other	<b>Terms Considered:</b> Cash; Conventional
<b>Location:</b>	<b>Utilities:</b> 3-Phase Electric
<b>Land Income:</b>	<b>Use:</b> Mixed; Retail; Other
<b>Fire Protect:</b> None	

**Days On Market:** 5  
**Sold Price:** 788,000

**Sold Price Sqft:** 36.3  
**Terms of Sale:** Cash

**Sold Date:** 12/16/2015

**Public Remarks:** Historic Waterfront downtown Fort Pierce, One of a kind, large corner, stand alone commercial building, unlimited potential. Walk to Marina, Fishing, Shopping, Theatre, Restaurants. Your chance to have this highly visible corner with over 21,000 open sq.ft space



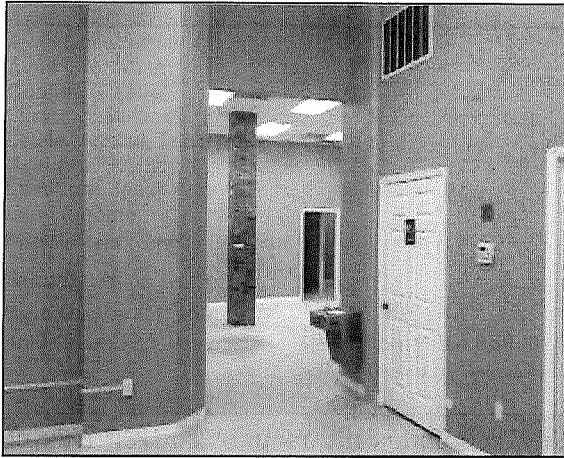
**Joanne McCurdy**  
**McCurdy and Company Realty**  
 171 Melody Ave  
 Fort Pierce, FL 34950  
 772-216-2821  
 joanemccurdy1@aol.com

Information is deemed to be reliable, but is not guaranteed. © 2016 MLS and FBS. Prepared by Joanne McCurdy on Tuesday, January 12, 2016 11:37 AM. The information on this sheet has been made available by the MLS and may not be the listing of the provider.

## Comm/Industry Customer Report

109 N 2nd Street, Fort Pierce, FL 34950

List Price: \$12



**List Number:** RX-10046180  
**Area:** 7100  
**Geo Area:** SL06  
**County:** St. Lucie  
**For Sale:** No  
**For Lease:** Yes  
**Subdivision:** Aaron Lees Map Of Fort Pierce  
**Status:** Closed  
**Property Desc:** commercial  
**Parcel ID:** 241050300860005  
**List Price:** 12  
**Waterfront:** No  
**Zoning:** c-4

**Property Desc:** commercial  
**Legal Desc:** AARON LEE'S MAP OF FORT PIERCE BLK H N 64 FT OF LOTS 11 AND 12 (MAP 24/10B) (OR 1331-2663)  
**Virtual Tour:**

<b>Year Built:</b> 1925	<b>RE Taxes:</b> 12,877.47	<b>Miles to Expressway:</b> 8
<b>Year Built Desc:</b>	<b>Tax Year:</b> 2013	<b>Miles to Beach:</b> 2
<b>Tot Bldg SqFt:</b> 250	<b>SqFt Source:</b> Other	<b>Type:</b> Commercial Industrial
<b>Total Units:</b> 110		<b># of Stories:</b> 1
<b>Acres:</b> 0	<b>Baths - # Toilets:</b> 2	<b># of Meters:</b>
<b>% Air Conditioned:</b> 100	<b>Ann Assoc/Condo Dues:</b>	

**Building Info:** # of Offices: 8; Interior Ceiling Hgt: 15; Miles to Expressway: 8; Miles to Beach: 2

**Directions:** US, east on Orange Ave, north on 2nd.

<b>Avail Docs:</b> None	<b>Possession:</b> Subject to Lease
<b>Avail Info:</b> None	<b>Roof:</b> Other
<b>Cooling:</b> Central	<b>Sale Includes:</b> None
<b>Flooring:</b> Other	<b>Type of Building:</b> Office Space; Office/Professional; Office/Retail
<b>Lease:</b> Annual; Triple Net; 1-3 Years	<b>Tenant Pays:</b> Cable; Electric
<b>Heating:</b> Electric	<b>Terms Considered:</b> Will Rent
<b>Location:</b> Beach Area; Central Business Dst; City	<b>Utilities:</b> Public Sewer; Public Water
<b>Land Income:</b>	<b>Use:</b> Professional Office; Retail
<b>Fire Protect:</b> Smoke Detector	<b>Construction:</b> CBS; Concrete
<b>Security:</b> None	
<b>Days On Market:</b> 105	
<b>Sold Price:</b> 12.5	<b>Sold Price Sqft:</b> 0.05
	<b>Terms of Sale:</b> Leased
	<b>Sold Date:</b> 09/12/2014

**Public Remarks:** Space is from 250 sq.ft up to 3000 sq.ft. 8 offices large open spaces, tall ceilings, right downtown, use the whole space or make an offer on whatever you need. Landlord will negotiate build out and terms. Call to see this great location.



**Joanne McCurdy**  
**McCurdy and Company Realty**  
 171 Melody Ave  
 Fort Pierce, FL 34950  
 772-216-2821  
 joannemccurdy1@aol.com

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**Comm/Industry Customer Report**

2935 W MIDWAY Road, Fort Pierce, FL 34981

List Price: \$18



List Number: 2811849  
 Area: 7370  
 Geo Area: SL05  
 County: St. Lucie  
 For Sale: No  
 For Lease: Yes  
 Subdivision: ACREAGE

List Price: 18  
 Waterfront: No  
 Zoning: co

Property Desc: 6 Units form 1185 sq  
 Legal Desc: Acreage Lot: Blk: Lot SqFt:204296 Frontage: Depth:  
 Virtual Tour:

Year Built: 2007	RE Taxes:	Miles to Expressway:
Year Built Desc:	Tax Year: 2006	Miles to Beach:
Tot Bldg SqFt: 3,573	SqFt Source:	Type: Commercial Industrial
Total Units:	Baths - # Toilets: 1	# of Stories: 1
Acres:	Ann Assoc/Condo Dues:	# of Meters: 1
% Air Conditioned: 100		

**Building Info:** # of Offices: 3; Interior Ceiling Hgt: 9; # of Tenants: 0

- Unit 1: # of Units: 1,185; Full Baths: 1
- Unit 2: # of Units: 1,203; Full Baths: 1
- Unit 3: # of Units: 1,185; Full Baths: 1
- Unit 4: # of Units: 3,573; Full Baths: 1

**Directions:** Midway Rd. just west of 25th St.

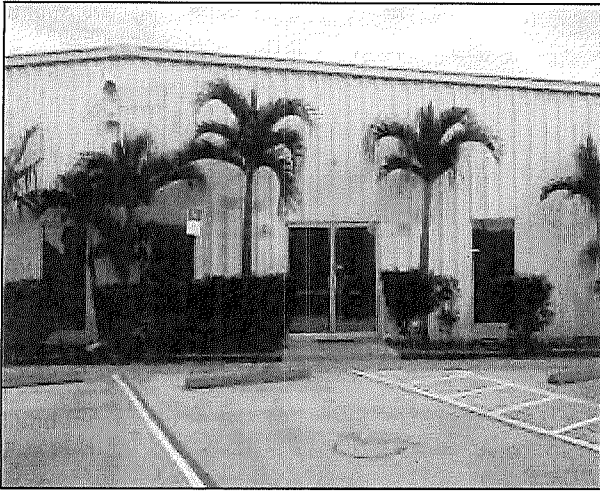
Avail Docs: None	Possession: At Closing
Avail Info: None	Roof: S-Tile
Cooling: Central	Sale Includes: None
Flooring: Concrete	Type of Building: Commercial
Lease: 1-3 Years; 4-6 Years	Tenant Pays: Cable; Common Area Maint.; Electric; Taxes
Heating: Central	Terms Considered: Will Rent
Location: Central Business Dst	Utilities: Public Sewer; Public Water
Land Income:	Use: Professional Office; Retail; Other
Fire Protect: Smoke Alarm	Construction: CBS
Miscellaneous 1: Landscaped	
Miscellaneous 2: Traffic Heavy	
Maintenance Fee Incl: Insurance-Bldg; Sewer; Water	
Days On Market: 428	
Sold Price:	Sold Price Sqft:
	Terms of Sale:
	Sold Date:

**Public Remarks:** TOP LOCATION, NEW CBS CUSTOM BUILT, OFFICE/PROFF; MEDICAL, ETC.. 6 UNITS FROM 1185 SQ.FT. UP TO 1336. SG. FT. TOTAL BUILDING 4000 SQ. FT. INCLUDES . Fully finished .WILL DO CUSTOM BUILD OUT. TRIPLE NET LEASE , 18.00 SQ. FT. 3.00 CAM . MAKE OFFERS



**Joanne McCurdy**  
**McCurdy and Company Realty**  
 171 Melody Ave  
 Fort Pierce, FL 34950  
 772-216-2821  
 joannemccurdy1@aol.com

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**List Number:** RX-3334313  
**Area:** 7050  
**Geo Area:** SL08  
**County:** St. Lucie  
**For Sale:** Yes  
**For Lease:** Yes  
**Subdivision:** Airport Indust Park Unit 01

**Status:** Closed  
**Property Desc:** Custum built out  
**Desc:** off  
**Parcel ID:** 142950100290007

**Original List Price:** 399,000  
**List Price:** 389,750  
**Waterfront:** No  
**Zoning:** IL

**Property Desc:** Custum built out off  
**Legal Desc:** Airport Indust Park Unit 01 Lot:5 Blk:3  
**Virtual Tour:**

**Year Built:** 1974  
**Year Built Desc:** Resale  
**Tot Bldg SqFt:** 14,204  
**Total Units:** 1  
**Acres:** 1.25  
**% Air Conditioned:** 50

**RE Taxes:** 7,762  
**Tax Year:** 2012  
**SqFt Source:** Appraisal  
**Max Ceiling Hgt:** 20  
**Baths - # Toilets:** 3  
**Ann Assoc/Condo Dues:**

**Miles to Expressway:**  
**Miles to Beach:**  
**Type:** Commercial Industrial  
**# of Stories:** 1  
**# of Meters:** 1

**Building Info:** # of Offices: 7; # of Tenants: 1; # of Bays: 5; Door Height: 16; # of Loading Docks: 3

**Directions:** St Lucie Blvd, right on 33rd st

**Showing Instructions:** Call Listing Agent; Tenant Occupied

**LO:** 802757 **McCurdy and Company Realty** 772-242-8436

**LM:** 53023629 **Joanne McCurdy** 772-216-2821

**Com/BuyerAgt:** 3% **Comm/Non-Rep:** 0% **Trans Brk:** 3%

**Var/Dual Rate:** Yes **List Type:** Ex Rt

**Owner Name:** Netos Enterprises Inc

**List Off Agency:** Transaction Broker

joannemccurdy1@aol.com

**Bonus:**

**XD:** 11/02/2013

**LD:** 12/24/2012

**Any Broker Advertise:**

**Avail Docs:** Survey

**Avail Info:** Contracts; None

**Cooling:** Central

**Flooring:** Ceramic Tile; Concrete

**Lease:** Annual

**Heating:** Central

**Location:** Airport Access; Industrial Park

**Land Income:**

**Fire Protect:** Smoke Alarm

**Possession:** At Closing

**Roof:** Metal

**Sale Includes:** Building and Land

**Type of Building:** Building Trades; Free Standing; Industrial / Mfg

**Tenant Pays:** Electric; Repairs; Water

**Terms Considered:** Cash; Conventional; Owner

**Utilities:** 3-Phase Electric

**Use:** Industrial

**Waterfront:** None

**Days On Market:** 101

**Sold Price:** 310,000

**Selling Office:** McCurdy and Company Realty 802757

**Selling Agent:** Joanne McCurdy; 53023629

**Cumulative DOM:** 101

**Sold Price Sqft:** 21.82

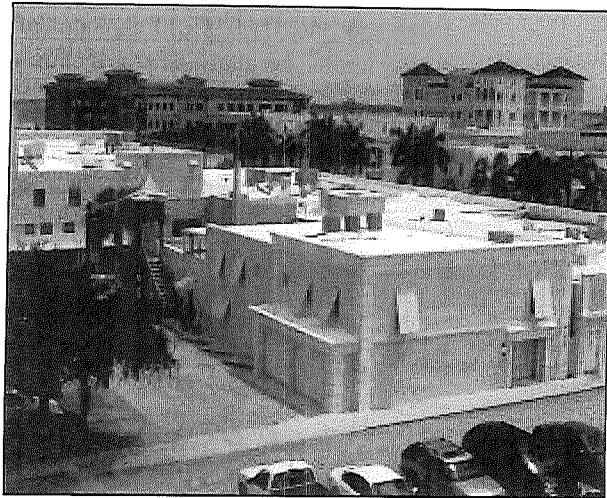
**Terms of Sale:** Conventional

**Under Contract Date:** 04/04/2013

**Sold Date:** 05/17/2013

**Public Remarks:** Custom built, nice offices, big warehouse, currently leased to the Food Bank (please do not disturb) shown by appointment. Move in condition. 1/3 offices 2/3 warehouse Fenced property, loading docs, Open to reasonable offers. Owner will lease. Owner willing to lease at \$3.00 sqft. Owner financing also possible.

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**List Number:** RX-10088348  
**Area:** 7030  
**Geo Area:** SL08  
**County:** St. Lucie  
**For Sale:** Yes  
**For Lease:** No  
**Subdivision:** AARON LEES MAP OF FORT PIERCE

**Status:** Active  
**Property Desc:** Res/Comm  
**Parcel ID:** 241050300820007

**Original List Price:** 634,000  
**List Price:** 589,000  
**Waterfront:** No  
**Zoning:** C4

**Property Desc:** Res/Comm

**Legal Desc:** AARON LEE'S MAP OF FORT PIERCE BLK H N 1/2 OF LOTS 8 AND 9 (MAP 24/10B) (OR 1331-2572)

**Virtual Tour:**

**Year Built:** 1897  
**Year Built Desc:**  
**Tot Bldg SqFt:** 7,000  
**Total Units:** 3  
**Acres:** 0.16  
**% Air Conditioned:** 100

**RE Taxes:** 5,765.55  
**Tax Year:** 2013  
**SqFt Source:** Tax Rolls  
**Max Ceiling Hgt:** 10  
**Baths - # Toilets:** 4  
**Ann Assoc/Condo Dues:**

**Miles to Expressway:** 6  
**Miles to Beach:** 2  
**Type:** Commercial Industrial  
**# of Stories:** 2  
**# of Meters:**

**Building Info:** # of Offices: 8; Interior Ceiling Hgt: 8; Miles to Expressway: 6; Miles to Beach: 2

**Auction:** No

**Directions:** Indian River Dr or US #1 to Ave A to Depot Dr.

**Showing Instructions:** 24 Hour Notice; Call Listing Agent

**LO:** 802757

McCurdy and Company Realty 772-242-8436

**LM:** 53023629

Joanne McCurdy 772-216-2821

**Com/BuyerAgt:** 2.5%

**Comm/Non-Rep:** 0%

**Trans Brk:** 2.5%

joannemccurdy1@aol.com

**Var/Dual Rate:** Yes

**List Type:** Ex Rt

**List Off Agency:** Transaction Broker

**Bonus:**

**LD:** 11/11/2014

**XD:** 05/05/2016

**Owner Name:** Withheld

**Broker Only Remarks:** Reduced Owner wants offers. Unique Commercial and Residential building in the heart of downtown Fort Pierce. At least 11 offices, Tenant occupied make 24 hr apt

**Any Broker Advertise:** No

**Avail Docs:** None

**Possession:** At Closing

**Avail Info:** None

**Roof:** Flat Tile

**Cooling:** Ceiling Fan; Central Building;

**Sale Includes:** Building and Land; Equipment; Fixtures

**Zoned**

**Type of Building:** Commercial; Free Standing; Office/Retail; Resident. Multi-Fam.; Restaurant; Shopping Center

**Flooring:** Tile; Wood Floor

**Tenant Pays:** Cable; Electric

**Lease:** None

**Terms Considered:** Cash; Conventional

**Heating:** Central

**Location:** Beach Area; Central Business Dst;

**Utilities:** Cable; Public Sewer; Public Water; Separate Meter

**City**

**Use:** Mixed; Professional Office; Retail

**Land Income:**

**Fire Protect:** Smoke Detector

**Construction:** CBS

**Waterfront:** None

**Days On Market:** 427

**Cumulative DOM:** 427

**Sold Price:**

**Sold Price Sqft:**

**Under Contract Date:**

**Selling Office:**

**Terms of Sale:**

**Sold Date:**

**Selling Agent:** ;

**Public Remarks:** Reduced Owner wants offers. Unique Commercial and Residential building in the heart of downtown Fort Pierce. At least 11 offices, Can live upstairs and have full commercial downstairs or use the whole building for either commercial or residential. Roof top view, walk to Marinas, Restaurants, Sunrise Theatre, Court House, shops, etc. Historic value, showcased on HGTV, this amazing home and property can be yours for commercial, retail or as a home. Must see to appreciate. All information approximate.

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<b>List Number:</b> 10152415	<b>RX-Property:</b> 14 acres,	<b>Status:</b> Active	<b>Original List Price:</b> 1,200,000
<b>Area:</b> 7300	<b>Desc:</b>		<b>List Price:</b> 1,200,000
<b>Geo Area:</b> SL03	<b>Parcel ID:</b> 232811300020004		<b>Waterfront:</b> No
<b>County:</b> St. Lucie			<b>Zoning:</b> Retail, Ag-2
<b>For Sale:</b> Yes			
<b>For Lease:</b> Yes			

**Property Desc:** 14 acres,**Legal Desc:** 28 35 39 THAT PART OF S 3/4 OF E1/2 OF NE 1/4 LYG N OF OKEE RD MPDAF: FROM A PT OF INT OF W R/W CANAL #51 AND NLY R/W OK**Virtual Tour:**

**Year Built:** 1999  
**Year Built Desc:**  
**Tot Bldg SqFt:** 4,598  
**Total Units:** 5  
**Acres:** 13  
**% Air Conditioned:** 100

**RE Taxes:** 3,448  
**Tax Year:** 2014  
**SqFt Source:** Tax Rolls  
**Max Ceiling Hgt:** 18  
**Baths - # Toilets:** 5  
**Ann Assoc/Condo Dues:**

**Miles to Expressway:** 1  
**Miles to Beach:** 8  
**Type:** Commercial Industrial  
**# of Stories:** 2  
**# of Meters:** 3

**Building Info:** # of Offices: 6; # of Tenants: 0; Miles to Expressway: 1; Miles to Beach: 8

**Unit 1:** Full Baths: 2  
**Unit 2:** # of Units: 4  
**Unit 3:** # of Units: 1

**Auction:** No**Directions:** Okeechobee Rd just west of Turnpike and 95. on north side of road**Showing Instructions:** Call Listing Agent; Call Listing Office**LO:** 802757      **McCurdy and Company Realty**      772-242-8436**LM:** 53023629      **Joanne McCurdy**      772-216-2821**Com/BuyerAgt:** 3%      **Comm/Non-Rep:** 0%**Trans Brk:** 3%

joannemccurdy1@aol.com

**Var/Dual Rate:** Yes      **List Type:** Ex Rt**List Off Agency:** Transaction Broker**Bonus:****LD:** 07/13/2015**XD:** 02/01/2016**Owner Name:** withheld**Broker Only Remarks:** Please do not disturb tenants**Any Broker Advertise:** No**Avail Docs:** None**Avail Info:** Copies of Lease**Cooling:** Ceiling Fan; Central; Zoned**Flooring:** Carpet; Ceramic Tile; Concrete**Lease:** Triple Net; 1-3 Years; 4-6 Years**Heating:** Central; Zoned**Location:** County**Land Income:****Fire Protect:** None**Possession:** At Closing**Roof:** Comp Shingle**Sale Includes:** Building and Land**Type of Building:** Building Trades; Free Standing; Mini Warehouse; Retail; Storage/ Warehouse; Other**Tenant Pays:** Electric; Insurance; Taxes**Terms Considered:** Conventional; Lease Option; Lease Purchase; Will Rent**Utilities:** 3-Phase Electric; Separate Meter; Septic; Well Water**Use:** Mixed; Retail; Other**Days On Market:** 183**Cumulative DOM:** 416**Sold Price:****Sold Price Sqft:****Under Contract Date:****Selling Office:****Terms of Sale:****Sold Date:****Selling Agent:** ;

**Public Remarks:** 14 acres and over 5000 sq.ft. of buildings, nursery, retail, house. Farmers market is leased to a great tenant, house is lease out, owner user. Income of 3700 a month as is not to include the owner user. Please do not contact owner or tenant. Lease and purchase all terms negotiable.

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## References

1. Kraaz & Kraaz Financial

Hanz Kraaz

124 N 2<sup>nd</sup> Street Fort Pierce, FL 34950

772.464.5885

Listing properties, purchasing of properties, and leasing of properties.

2. Galleria of Pierce Harbor

Gus Gutierrez

100 South 2<sup>nd</sup> Street, Fort Pierce, FL 34950

772.801.5729

[info@galleriaofpierceharbor.com](mailto:info@galleriaofpierceharbor.com)

Listing properties, purchasing of properties, and leasing of properties.

3. Drawdy Brothers Construction

Troy Drawdy

2945 Midway Road, Fort Pierce, FL 34981

772.464.8160

[troy@drawdybrothers.com](mailto:troy@drawdybrothers.com)

Listing properties, purchasing of properties, and leasing of properties.



STATE OF FLORIDA  
DEPARTMENT OF BUSINESS AND  
PROFESSIONAL REGULATION

BK3278242

ISSUED: 02/02/2015

REAL ESTATE BROKER  
MCCURDY, JOANNE

IS LICENSED under the provisions of Ch.475 FS.

Expiration date : MAR 31, 2017

L1502020001097

No. 16-00025848

# CITY OF FORT PIERCE BUSINESS TAX RECEIPT

2015 - 2015

100 N. U.S. # 1 - Fort Pierce, FL - 34950  
772-467-3000

BUSINESS NAME: MCCURDY AND COMPANY REALTY . MCCURDY, JOANNE

MAILING ADDRESS: 171 MELODY LN . LOCATION: 171 MELODY LN PRINCIPAL

FT PIERCE FL 34950 PHONE: 242-8436

may hereby engage in the following business, profession or occupation.  
 CLASSIFICATION: 188A REAL ESTATE OFFICE  
 REAL ESTATE BROKER-JOANNE MCCURDY

IN THE CITY OF FORT PIERCE, FLA. FOR THE PERIOD BEGINNING ON THE 1ST DAY OF OCTOBER AND ENDING SEPTEMBER 30.

ISSUED JULY 28 2015

This Receipt becomes null and void if business name, classification, ownership or address is changed.

I understand and agree that issuance of a Business Tax Receipt does not allow occupancy, nor exempt the possessor from compliance with any City Code or Ordinance. Receipt may be revoked in accordance with Section 9-29.

*Linda W Cox* (SEAL)  
 CITY CLERK  
 TAX AMOUNT 79.55  
 NEW / RENEWAL FEE 5.00  
 PENALTY .00  
 TOTAL 84.55



<b>Coverage:</b>	<b>CNA Connect®</b>	<b>Account Name:</b>	<b>MCCURDY &amp; CO REALTY</b>
<b>Underwritten by:</b>	<b>TRANSPORTATION INSURANCE COMPANY (20494)</b>	<b>Policy Period:</b>	<b>02/02/2015 - 02/02/2016</b>

**Policy Information**

SIC: 65312 - REAL ESTATE AGENTS:RESIDENTIAL - EXCL. PROFESSIONAL

Primary Risk State: FL

#PT Employees: 2

#FT Employees: 0

**PROPERTY**

<b>Policy Deductible</b>			<b>\$1,000</b>	
<b>Co-Insurance</b>			<b>Waived</b>	
<b>Policy Coverage</b>	<b>Limit</b>	<b>Deductible/Retention*</b>		<b>Premium</b>
Business Income & Extra Expense	12 Months Actual Loss Sustained			Included
Business Income Extension	90 Days			Included
Business Income and Extra Expense - Dependent Property	\$25,000	24 hour		Included
Business Income and Extra Expense - Newly Acquired Premise	\$500,000			Included
Choice Endorsement				\$113.00
Employee Dishonesty	\$25,000	\$250		Included
Expediting Expenses	\$25,000	Policy Level		Included
Forgery & Alteration	Included	Policy Level		Included
Identity Theft/Recovery Services	\$25,000	\$250		Included
Terrorism Risk Insurance Act Premium				\$2.00

**The Following Coverages Apply To Each Location**

<b>Coverage</b>	<b>Limit</b>	<b>Deductible/Retention*</b>	<b>Premium</b>
Appurtenant Buildings And Structures	\$50,000	Policy Level	Included
Arson & Theft Reward	\$5,000	None	Included
Brands or Labels	\$25,000	Policy Level	Included
Civil Authority	4 weeks	24 hours	Included
Claim Data Expense	\$10,000	Policy Level	Included
Fire Department Service Charge	\$25,000	None	Included
Fire Protective Equipment Discharge	\$10,000	Policy Level	Included
Limited Building Coverage - Tenant Obligation	\$5,000	Policy Level	Included
Lost Key Consequential Loss	\$500 per premises	None	Included
Newly Acquired or Constructed Building	\$1,000,000	Policy Level	Included
Newly Acquired or Constructed Business Personal Property	\$500,000	Policy Level	Included
Non Owned Detached Trailers	\$5,000	Policy Level	Included
Outdoor Property	\$10,000	Policy Level	Included
Personal Effects	\$25,000	Policy Level	Included
Personal Property of Others	Included in BPP Limit	Policy Level	Included
Pollutant Clean Up & Removal	\$25,000 Annual Total	Policy Level	Included
Preservation of Property	BPP Limit up to 90 days	Policy Level	Included
Signs	Included	Policy Level	Included
Spoilage - Consequential Loss	Included in BPP Limit	Policy Level	Included
Temporary Relocation of Property	\$50,000 up to 90 days	Policy Level	Included
Tenant Glass	Included in BPP Limit	Policy Level	Included

\* Specific deductibles may apply to certain causes of loss. See policy for additional details.



Coverage:	CNA Connect®	Account Name:	MCCURDY & CO REALTY
Underwritten by:	TRANSPORTATION INSURANCE COMPANY (20494)	Policy Period:	02/02/2015 - 02/02/2016

Theft Damage to Rented Property	Included in BPP Limit	Policy Level	Included
Unauthorized Business Card Use	\$5,000	Policy Level	Included

\* Specific deductibles may apply to certain causes of loss. See policy for additional details.



<b>Coverage:</b>	<b>CNA Connect®</b>	<b>Account Name:</b>	<b>MCCURDY &amp; CO REALTY</b>
<b>Underwritten by:</b>	<b>TRANSPORTATION INSURANCE COMPANY (20494)</b>	<b>Policy Period:</b>	<b>02/02/2015 - 02/02/2016</b>

**Location: 001**

**Address:** 171 Melody Ln  
FORT PIERCE, FL 34950

**Construction:** Masonry Non-Combustible  
**Protection Class:** 3      **Year Built:** 2008  
**Sprinklered:** No      **Sq Footage:** 1000

**Class Description:** REAL ESTATE AGENTS:RESIDENTIAL - EXCL. PROFESSIONAL

<u>Coverage</u>	<u>Limit</u>	<u>Deductible/Retention*</u>	<u>Premium</u>
Inflation Guard	3%	Policy Level	\$6.00
Business Personal Property (BPP)	\$45,000	Policy Level	\$387.00
Seasonal Increase	25%	Policy Level	Included
Business Personal Property- Off Premises	\$45,000	Policy Level	Included
<b>Other Location Coverages</b>			
	<u>Limit</u>	<u>Deductible/Retention*</u>	<u>Premium</u>
Accounts Receivable	\$125,000	None	Included
Building Glass		Policy Level	Included
Computer Fraud	\$5,000	Policy Level	Included
Debris Removal	25% + \$25,000	Policy Level	Included
Electronic Data Processing	\$50,000	Policy Level	Included
Electronic Data Processing - In Transit	\$50,000	Policy Level	Included
Equipment Breakdown	\$45,000	Policy Level	\$6.00
Pollutants	\$25,000	Policy Level	Included
Expediting Expenses	\$25,000	Policy Level	Included
Fine Arts	\$25,000	Policy Level	Included
Money Orders & Counterfeit Paper	Included in BPP Limit	Policy Level	Included
Money and Securities	Included in BPP Limit	Policy Level	Included
Ord/Law - Demo. Incr. Cost Constr including	\$25,000	Policy Level	Included
Tenant Improvements or Betterments			
Ordinance or Law - Increased Period of Restoration	\$50,000	Policy Level	Included
Outdoor Trees, Shrubs, Plants, Lawns	\$5,000	Policy Level	Included
Sewer & Drain Backup	\$25,000	Policy Level	\$23.00
Targeted Hacker Attack	\$25,000	Policy Level	Included
Utility Services - Direct Damage	\$2,500	Policy Level	Included
Utility Services - Time Element	\$2,500	24 hours	Included
Valuable Papers and Records	\$25,000	Policy Level	Included
Wind and Hail	Excluded		
<b>Location #001 Property Premium:</b>			<b>\$422.00</b>

\* Specific deductibles may apply to certain causes of loss. See policy for additional details.



<b>Coverage:</b>	<b>CNA Connect®</b>	<b>Account Name:</b>	<b>MCCURDY &amp; CO REALTY</b>
<b>Underwritten by:</b>	<b>TRANSPORTATION INSURANCE COMPANY (20494)</b>	<b>Policy Period:</b>	<b>02/02/2015 - 02/02/2016</b>

**Location: 002**

**Address:** 109 Orange Ave  
FORT PIERCE, FL 34950

**Construction:** Masonry Non-Combustible  
**Protection Class:** 3      **Year Built:** 2008  
**Sprinklered:** Yes      **Sq Footage:** 900

**Class Description:** REAL ESTATE AGENTS:RESIDENTIAL - EXCL. PROFESSIONAL

<u>Coverage</u>	<u>Limit</u>	<u>Deductible/Retention*</u>	<u>Premium</u>
Inflation Guard	3%	Policy Level	\$1.00
Business Personal Property (BPP)	\$10,000	Policy Level	\$67.00
Seasonal Increase	25%	Policy Level	Included
Business Personal Property- Off Premises	\$10,000	Policy Level	Included
<b><u>Other Location Coverages</u></b>			
Accounts Receivable	\$125,000	None	Included
Building Glass		Policy Level	Included
Computer Fraud	\$5,000	Policy Level	Included
Debris Removal	25% + \$25,000	Policy Level	Included
Electronic Data Processing	\$50,000	Policy Level	Included
Electronic Data Processing - In Transit	\$50,000	Policy Level	Included
Equipment Breakdown	\$10,000	Policy Level	\$1.00
Pollutants	\$25,000	Policy Level	Included
Expediting Expenses	\$25,000	Policy Level	Included
Fine Arts	\$25,000	Policy Level	Included
Money Orders & Counterfeit Paper	Included in BPP Limit	Policy Level	Included
Money and Securities	Included in BPP Limit	Policy Level	Included
Ord/Law - Demo. Incr. Cost Constr including	\$25,000	Policy Level	Included
Tenant Improvements or Betterments			
Ordinance or Law - Increased Period of Restoration	\$50,000	Policy Level	Included
Outdoor Trees, Shrubs, Plants, Lawns	\$5,000	Policy Level	Included
Sewer & Drain Backup	\$25,000	Policy Level	\$23.00
Targeted Hacker Attack	\$25,000	Policy Level	Included
Utility Services - Direct Damage	\$2,500	Policy Level	Included
Utility Services - Time Element	\$2,500	24 hours	Included
Valuable Papers and Records	\$25,000	Policy Level	Included
Wind and Hail	Excluded		
<b>Location #002 Property Premium:</b>			<b>\$92.00</b>

**Total Property Premium: \$629.00**

\* Specific deductibles may apply to certain causes of loss. See policy for additional details.



Coverage:	CNA Connect®	Account Name:	MCCURDY & CO REALTY
Underwritten by:	TRANSPORTATION INSURANCE COMPANY (20494)	Policy Period:	02/02/2015 - 02/02/2016

**LIABILITY**

<u>Policy Coverage</u>	<u>Limit</u>	<u>Deductible/Retention*</u>	<u>Premium</u>
Additional Insureds:			Included
Blanket Additional Insured - Liability Extension			Included
Damage To Premises Rented To You	\$300,000		Included
General Liability			\$43.00
Each Occurrence	\$1,000,000		Included
Personal And Advertising Injury	\$1,000,000		Included
Products Completed Operations Aggregate	\$2,000,000		Included
General Aggregate	\$2,000,000		Included
Medical Expense	\$10,000		Included

**Location Information**

Location: 001  
Location Address: 171 Melody Ln  
FORT PIERCE, FL 34950  
Class Description: REAL ESTATE AGENTS:RESIDENTIAL - EXCL. PROFESSIONAL

**Location Information**

Location: 002  
Location Address: 109 Orange Ave  
FORT PIERCE, FL 34950  
Class Description: REAL ESTATE AGENTS:RESIDENTIAL - EXCL. PROFESSIONAL

**Total Liability Premium: \$43.00**

\* Specific deductibles may apply to certain causes of loss. See policy for additional details.  
\*\*\* - Retention



## DRUG-FREE WORK PLACE FORM

The undersigned vendor in accordance with Florida Statute 287.087 hereby certified that

McCurdy & Co. Realty does:  
(Name of Business)

1. Publish a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.
2. Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.
3. Give each employee engaged in providing the commodities or Agreemental services that are proposed a copy of the statement specified in subsection (1).
4. In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or Agreemental services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or nolo contendere to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.
5. Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.
6. Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

As the person authorized to sign the statement, I certify that this firm complies fully with the above requirements.

Joanne McCurdy  
Proposer's Signature  
1-11-16  
Date

## Request for Taxpayer Identification Number and Certification

Give form to the requester. Do not send to the IRS.

Print or type See Specific Instructions on page 2.	Name (as shown on your Income tax return) <i>Joanne McCurdy</i>	
	Business name, if different from above <i>McCurdy and Co. Realty</i>	
	Check appropriate box: <input type="checkbox"/> Individual/Sole proprietor <input checked="" type="checkbox"/> Corporation <input type="checkbox"/> Partnership <input type="checkbox"/> Limited liability company. Enter the tax classification (D=disregarded entity, C=corporation, P=partnership) ▶ ..... <input type="checkbox"/> Exempt payee <input type="checkbox"/> Other (see instructions) ▶	
	Address (number, street, and apt. or suite no.) <i>171 Melody Lane</i>	Requester's name and address (optional)
	City, state, and ZIP code <i>M. P. RE, FL 34950</i>	
List account number(s) here (optional)		

**Part I Taxpayer Identification Number (TIN)**

Enter your TIN in the appropriate box. The TIN provided must match the name given on Line 1 to avoid backup withholding. For individuals, this is your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Part I instructions on page 3. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN* on page 3.

Note. If the account is in more than one name, see the chart on page 4 for guidelines on whose number to enter.

Social security number	
or	
Employer identification number <i>46-2707338</i>	

**Part II Certification**

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me), and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
- I am a U.S. citizen or other U.S. person (defined below).

**Certification instructions.** You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the Certification, but you must provide your correct TIN. See the instructions on page 4.

<b>Sign Here</b>	Signature of U.S. person ▶ <i>Joanne McCurdy</i>	Date ▶ <i>1-11-16</i>
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**General Instructions**

Section references are to the Internal Revenue Code unless otherwise noted.

**Purpose of Form**  
A person who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) to report, for example, income paid to you, real estate transactions, mortgage interest you paid, acquisition or abandonment of secured property, cancellation of debt, or contributions you made to an IRA.

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN to the person requesting it (the requester) and, when applicable, to:

- Certify that the TIN you are giving is correct (or you are waiting for a number to be issued),
- Certify that you are not subject to backup withholding, or
- Claim exemption from backup withholding if you are a U.S. exempt payee. If applicable, you are also certifying that as a U.S. person, your allocable share of any partnership income from a U.S. trade or business is not subject to the withholding tax on foreign partners' share of effectively connected income.

**Note.** If a requester gives you a form other than Form W-9 to request your TIN, you must use the requester's form if it is substantially similar to this Form W-9.

**Definition of a U.S. person.** For federal tax purposes, you are considered a U.S. person if you are:

- An individual who is a U.S. citizen or U.S. resident alien,
- A partnership, corporation, company, or association created or organized in the United States or under the laws of the United States,
- An estate (other than a foreign estate), or
- A domestic trust (as defined in Regulations section 301.7701-7).

**Special rules for partnerships.** Partnerships that conduct a trade or business in the United States are generally required to pay a withholding tax on any foreign partners' share of income from such business. Further, in certain cases where a Form W-9 has not been received, a partnership is required to presume that a partner is a foreign person, and pay the withholding tax. Therefore, if you are a U.S. person that is a partner in a partnership conducting a trade or business in the United States, provide Form W-9 to the partnership to establish your U.S. status and avoid withholding on your share of partnership income.

The person who gives Form W-9 to the partnership for purposes of establishing its U.S. status and avoiding withholding on its allocable share of net income from the partnership conducting a trade or business in the United States is in the following cases:

- The U.S. owner of a disregarded entity and not the entity,



### Certification Statement Local Vendor Preference

I certify that my company meets all of the following qualifications to be eligible for the local vendor preference:

- 1) That my company has a fixed, staffed office or distribution point located in and having a street address within St. Lucie, Indian River, Martin or Okeechobee City for at least one year prior to the issuance of the request for competitive bids or request for proposals by St. Lucie City; and
- 2) That my company holds any business or Broker license required by St. Lucie City and/or can document payment of business license taxes in St. Lucie City;
- 3) That my company is principal offeror who is single offeror; a business which is the prime Broker and not a subBroker; or a partner or joint venturer submitting an offer in conjunction with other businesses.
- 4) Attached is a copy of a business or Broker license and/or business tax receipt for St. Lucie City, Indian River, Martin or Okeechobee Counties to verify that I have been in business at least one year prior to the issuance of the Request for Bid or Proposal.

Company Name: McCurdy & Co. Realty

Address: 171 Melody Lane, Fort Pierce, FL 34950

Business or Broker License Number: \_\_\_\_\_

Phone Number: 772-242-8436 Fax Number: 772-242-8509

Owner's Name: Joanne McCurdy

Signature: Joanne McCurdy



Sworn to before me this 11 day of January, 2016

Notary Public for the State of Florida My Commission Expires 4/20/16

Notary Public Signature Janice M. Hopper Printed Name Janice M. Hopper

#### FOR PROCURMENT OFFICE ONLY ~ DO NOT COMPLETE BELOW

To be verified and completed by an authorized representative from the City of Fort Pierce Purchasing Department:

Vendor Certified by: \_\_\_\_\_ Date: \_\_\_\_\_  
(Authorized Signature)

To be approved as a local bidder and receive bid preference on an eligible local project, this certification and a copy of your local business or Broker license must be submitted with your bonafide Bid/RFP package.



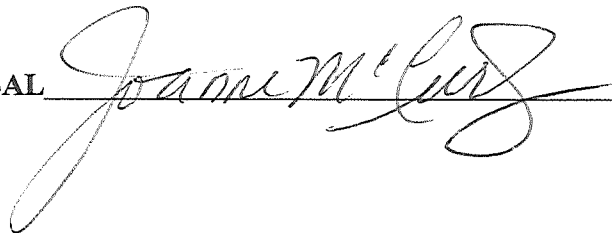
## CITY OF FORT PIERCE PROPOSER'S CHECKLIST

This checklist is provided to assist each Proposer in the preparation of their proposal response. Included in this checklist are important requirements, which is the responsibility of each Proposer to submit with their response in order to make their response fully compliant. This checklist is only a guideline~ it is the responsibility of each Proposer to read and comply with the Request for Proposal in its entirety.

Check "Yes" or "No" to each of the following:

	YES	NO
Is Request for Proposal cover page (page 1) completed, signed and attached?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
All prices have been reviewed for mathematical accuracy, all price corrections initialed, and all price extensions and totals thoroughly checked.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Include proof of proper licensing as stated in proposal documents.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Include proof of proper insurance as stated in proposal documents.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Proposal envelope is marked accordingly.	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Is Drug-Free Work Place form signed and enclosed?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
W-9 Form completed, signed and attached?	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Are six (6, one original and five copies) complete proposal packages and one electronic (PDF) on a USB Flash Drive included?	<input checked="" type="checkbox"/>	<input type="checkbox"/>

PLEASE SIGN AND RETURN WITH PROPOSAL

  
\_\_\_\_\_

**CRA Advisory Committee**

**Meeting Date:** 01/20/2016

**Re:**

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**Information**

**SUBJECT**

**STAFF COMMENTS**

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**Attachments**

*No file(s) attached.*

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