MEMORANDUM

To: City of Menasha Common Council

From: Peggy Steeno, Director of Administrative Services

Date: October 1, 2015

RE: Property Assessment Services – 2015 - 2018

BACKGROUND

Several years ago, the City of Menasha made the decision to outsource assessment services rather than to continue providing those services with in-house staff. Both of the current proposing firms have been interested in the City's assessment services since that point. The City did use Accurate Appraisal, LLC, as its assessor for a period of time. However, the City has partnered with Associated Appraisal Consultants, LLC, since 2008, as that firm was selected through RFP processes in both 2008 and 2012.

ANALYSIS

Staff received a total of two proposals for these services after sending the request for proposals out to five firms. In comparing the two proposals received, staff completed the following:

- Review of the Proposals (attached) as submitted,
- In-person interviews with each firm, and
- Reference checks.

Throughout the above process, the City researched and evaluated the following critical items with representatives from each firm:

- Ensuring the qualifications are in place to complete the assessment process prudently, ethically, and accurately;
- Ensuring the timing of the process so as not to have a repeat of the issues from the more recent tax year;
- Ensuring that the City continues to have electronic records for all parcels easily accessible, including the availability of information for ongoing reporting, tax bill creation, and customer service needs; the availability of historical and current data; and ability to link to the City's GIS system; and

- Ensuring that the selected firm is willing to work with City staff on ancillary assessment and recording needs.

In reviewing each of the above noted items, staff concluded that Associated Appraisal Consultants, LLC is better positioned to handle each of the above items, and serve as the City's Assessor for the next three year period, even though the cost to do business with Associated Appraisal Consultants, LLC is $11,325 greater than the cost to do business with Accurate Appraisal, LLC over the contract period.

FISCAL IMPACT

The fiscal impact of this item is a City obligation to pay either $174,825 (Associated Appraisal Consultants, LLC) or $163,500 (Accurate Appraisal, LLC), during the period of October 1, 2015 – July 31, 2018, for the receipt of Assessment Services.

RECOMMENDATION

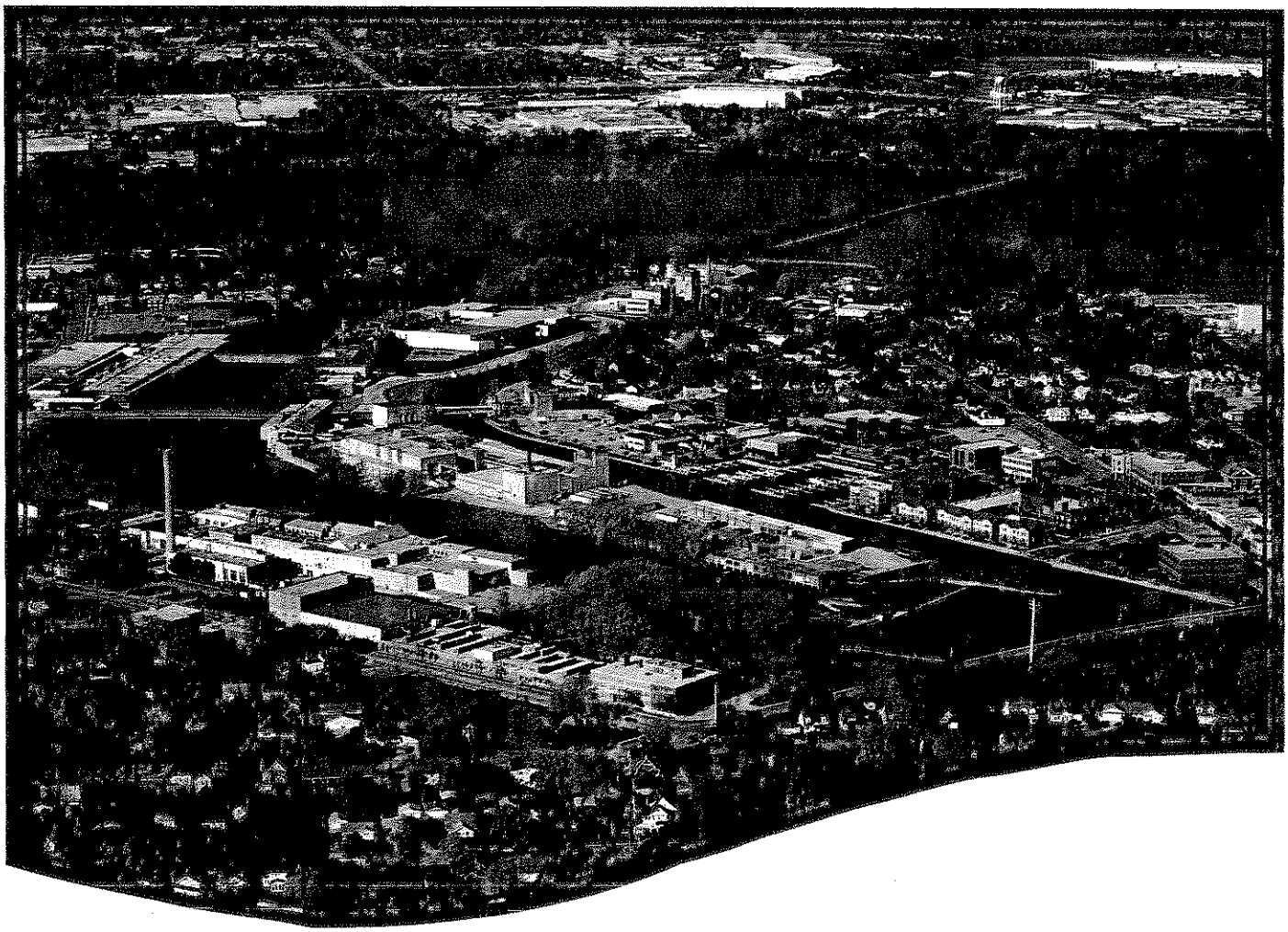
Staff recommends that Council approve Associated Appraisal Consultants, LLC as the City's Assessor for the period of October 1, 2015 – July 31, 2018.

Associated Appraisal
Consultants, Inc.
Appleton ■ Hurley ■ Lake Geneva

Real Estate

City of Menasha

Calumet/Winnebago Counties



Proposal for Assessment Services 2016-2020

Associated Appraisal Consultants, Inc.

Appleton ■ Hurley ■ Lake Geneva

Real Estate

September 14, 2015

Ms. Peggy Steeno
Administrative Services Director
City of Menasha
140 Main Street
Menasha, WI 54952

Dear Ms. Steeno:

On behalf of Associated Appraisal Consultants, Inc., I want to express our interest in continuing to serve as Municipal Assessor for the City of Menasha.

Associated Appraisal Consultants, Inc. was appointed as City Assessor in 2007. Since our appointment, we have worked diligently to provide quality assessment work and customer service for the City of Menasha. We have also improved the quality of the City's assessment records by correcting many inaccuracies and omissions made by the previous assessment firm.

We have worked to establish equity in the tax base by performing full-value maintenance assessments. Twenty-five percent of the City's parcels have been visited on an annual basis to ensure that assessments are fair, equitable and current. During our annual assessment work, we have also maintained all assessment records to meet the digital compliance requirements of the Wisconsin Department of Revenue.

Our Personal Property Department processes the mobile home park fees and lottery credits, as well as conducts audits of self-reported personal property statements, providing outstanding assistance to business owners and municipal officials.

In addition to assessments and personal property tax, Associated Appraisal Consultants, Inc., has provided quality real property listing services. We have kept property ownership records current and processed any new surveys, lot line adjustments, and new subdivision plats.

With Associated Appraisal Consultants, Inc., the City of Menasha has full access to property assessment data via the City's website link to www.apraz.com. Residents and the public are able to see a photograph of each property and view data such as square footage, room count, and assessed value. Internet access to assessment data provides transparency and easy access to valuable public information.

Associated Appraisal is proud to serve the City of Menasha as their Municipal Assessor. We provide a high quality, all-encompassing service at a fair price. We look forward to the opportunity to continue our relationship with the City of Menasha.

Regards,

Mark Brown
President

1314 W. College Ave. ■ P.O. Box 2111 ■ Appleton, WI 54912-2111 ■ (920) 749-1995 ■ Fax: (920) 731-4158

Cost of Services Summary:

Annual Full Value Assessment Services (25% Inspection per year)

- **2015 – October Through December – Fifteen Thousand Dollars ($15,000.00)**
- **2016 – Sixty Thousand Dollars ($60,000.00)**
- **2017 – Sixty Thousand Dollars ($60,000.00)**
- **2018 – January Through July – Thirty-Five Thousand Dollars ($35,000.00)**

Total Cost:

- Costs are all inclusive and comprise all functions as required in the RFP, no additional charges for extra time, additional parcels, annexations, office supplies, printing and mailing for the duration of the contract. No additional charges shall incur for maintaining assessments within 10% of market value for each year of the contract.
- No additional cost for newly constructed homes.
- All Associated Appraisal Consultants, Inc., staff members are certified at an appropriate level according to the State of Wisconsin Department of Revenue standards.
- Associated Appraisal Consultants, Inc. shall maintain insurance coverage to protect against claims, demands, actions and causes of action arising from any act, error or omission of the assessor, their agents and employees in the execution of work. The assessor shall be responsible for any and all of their agents and employees while performing acts under the terms of the contract. The City of Menasha shall be listed as an additional insured, and a certificate of insurance will be provided to the City.
- Associated Appraisal Consultants, Inc. shall conduct regular office hours between the hours of 8:00am to 12:00pm on Tuesday's and 12:00pm to 4:00pm on Thursdays of every week.

AGREEMENT FOR ANNUAL FULL-VALUE ASSESSMENT SERVICES

Prepared for the

CITY OF MENASHA

Calumet/Winnebago Counties

By

Associated Appraisal Consultants, Inc.
1314 W. College Avenue | P.O. Box 2111
Appleton, WI 54912-2111
Phone (920) 749-1995
Fax (920) 731-4158

Associated Appraisal Consultants, Inc.

Appleton ■ Hurley ■ Lake Geneva

Real Estate

Lake Geneva Office
Walworth County
P.O. Box 1114
Lake Geneva, WI 53147-1114

Ironwood, Michigan Office
N10257 Lake Road
Ironwood, MI 49938

Hurley Office
Iron County
P.O. Box 342
Hurley, WI 54534-0342

AGREEMENT FOR ANNUAL FULL-VALUE ASSESSMENT SERVICES

This Agreement is by and between the **City of Menasha, Calumet/Winnebago Counties, State of Wisconsin**, a municipal corporation (hereafter "Municipality") and ASSOCIATED APPRAISAL CONSULTANTS, INC., with its principal office at 1314 W. College Avenue, Appleton, WI 54914 (hereafter "Assessor") as follows:

I. SCOPE OF SERVICES. All services rendered shall be completed in full accordance and compliance with Wisconsin Statutes, the *Wisconsin Property Assessment Manual* and all rules and regulations officially adopted and promulgated by the Wisconsin Department of Revenue as of the date of this agreement.

A. **COMPLIANCE.** Assessor shall keep the City of Menasha's assessments in compliance with the Wisconsin Department of Revenue for the duration of this contract. The level of assessment shall annually be kept within 10% of the cities full equalized value.

B. **INSPECTIONS.** Assessor shall physically inspect 25% of improved properties on an annual basis and update assessment records, such that all improved properties will be inspected on a four-year cycle. The Assessor's annual inspection cycle shall include all of the following:

1) New construction, annexed properties, and properties with a change in exemption status shall be physically inspected, and the property record card prepared or updated as needed.

2) Properties affected by building removal, fire, significant remodeling (those requiring a building permit), or other major condition changes shall be physically inspected.

3) Improved properties under construction over a period of years shall be re-inspected.

4) All sales properties, legal description changes, and zoning changes shall be reviewed and inspected if deemed necessary to ensure a fair assessment.

5) Requests for review by property owners, made after the close of the municipal Board of Review, and prior to signing the affidavit for the next assessment roll, shall be physically inspected during the current assessment cycle.

6) A classification review shall be conducted annually to determine eligibility for agricultural use value assessment and the assessment of agricultural forestland and undeveloped land.

C. **PARCEL IDENTIFICATION.** The legal description, a copy of or a link to the County or Municipal digital parcel maps along with drawing and measurements of each land parcel and improvements shall be contained in the existing property record cards. Drawings shall be made for all new records. In the event of a discrepancy existing, the Assessor shall investigate and correct the record.

D. **PREPARATION OF RECORD CARDS.** Appropriate record cards shall be used in the evaluation and collection of data for residential improvements, commercial improvements, and agricultural improvements. All information relating to the improvements shall be obtained and shown as provided on the respective forms. The Assessor shall supply to the Municipality a complete set of property records either on computer readable format compatible with the Municipality's computer system if a computer valuation program is used, or a hardcopy if a manual system is used, and update the records within fourteen (14) days of final adjournment of the Board of Review. The records shall be updated prior to the open book and again to reflect any changes made at the Board of Review.

E. **APPROACH TO VALUE.** Assessor shall assess all taxable real estate according to market value, as established by professionally acceptable appraisal practices, except where otherwise provided by law. Assessor shall consider the sales comparison approach, the cost approach and the income approach in the valuation of all property.

1) **Sales Comparison Approach**. Assessor will collect, compile and analyze all available sales data for the municipality in order to become familiar with the prevailing market conditions and activity. A detailed analysis of sales data will be prepared, including a picture book of recent residential and agricultural sales. Vacant land sales will also be compiled and analyzed. In valuing property by the sales comparison approach, subject properties will be appraised through a detailed comparison to similar properties that have recently sold, making careful consideration of similarities and differences between the subject and comparable sale properties.

2) **Cost Approach**. The cost approach to value will be considered for all taxable improved property. Replacement costs for residential and agricultural improvements will be calculated per Volume II of the *Wisconsin Property Assessment Manual*. Replacement costs for commercial improvements will be calculated using Marshall & Swift valuation service. All accrued depreciation, including physical deterioration, functional obsolescence, and economic obsolescence will be accurately documented and deducted from current replacement costs.

3) **Income Approach**. Consideration of the income approach to value will be made when the income or potential income generated by the real estate is deemed likely to affect the property's resale value. Data to be analyzed will include economic rents, typical vacancy rates and typical operation expense ratios. In the valuation of property by the income approach, adequate records will be prepared, showing a reconstruction of income and expenses, as well as all calculations used to arrive at market value, including formulas and capitalization rates as appropriate to the type of property being appraised.

F. **OPEN BOOK CONFERENCE**. Upon completion of the Assessor's review of assessments and prior to completion of the assessment rolls, the Assessor shall hold open book conferences for the purpose of enabling property owners or their agents to review and compare the assessed values. The Assessor shall send notice to each property owner of any change in assessment. The notice form used shall be that prescribed by the Department of Revenue, and include the time and place the open book conference(s) will be held. Mailing shall not be less than fifteen days prior to the first day of the conference for the convenience of property owners. The Assessor shall take the phone calls to schedule appointments for the open book conference. The assessor shall be present at the open book conference for a one (1) day period, if necessary, the days to be consecutive to meet with the property owners or their agents. Assessor shall provide the necessary staff to handle the projected attendance.

G. **COMPLETION OF ASSESSMENT ROLL AND REPORTS.** The Assessor shall be responsible for the proper completion of the assessment roll in accordance with current statutes and the *Wisconsin Property Assessment Manual*. The Assessor shall provide final assessment figures for each property to the Municipality, and the roll shall be totaled to exact balance. Assessor shall prepare and submit all reports required of the Assessor by the Wisconsin Department of Revenue including: Municipal Assessment Report (MAR), the Tax Incremental District Assessment Report (TAR), The Annual Assessment Report (AAR) and the Exempt Computer Report (ECR). Prior to filing with the Wisconsin Department of Revenue, the Assessor will provide the municipality with reports (MAR & TAR) for review. All reports shall be submitted by the 2nd Monday in June and the Annual Assessment Report (AAR) due 30 days after the close of the annual Board of Review. Assessor shall follow the Uniform Standards of Professional Appraisal Practice (USPAP) as required by the Wisconsin Property Assessment Manual; postage is at the Assessor's expense.

H. **BOARD OF REVIEW ATTENDANCE.** The Assessor or his/her authorized representative shall attend all hearings of the Municipal Board of Review to explain and defend the assessed value and be prepared to testify under oath in regard to the values determined for a one (1) day period, if necessary, the days to be consecutive to provide testimony in defense if needed. All Board of Review appeals must be made in a formal manner, which complies with the State Statutes governing the assessment process. This includes filing with the Clerk, prior to the Board of Review, a properly completed objection form.

I. **PERSONAL PROPERTY ASSESSMENTS.** The Assessor shall prepare and distribute annual personal property statements to all businesses; postage is at the Assessor's expense. By May 1st each year the Assessor will review statements and follow up with un-filed or incorrect statements. The Assessor shall determine the appropriate assessment. The Assessor shall exercise particular care so that personal property as a class on the assessment roll bears the same relation to statutory value as real property as a class.

J. **PUBLIC REQUESTS.** The Assessor shall timely respond to all open records requests received by the Assessor. In so doing, the Assessor shall comply with the confidentiality provisions of the law, including sec. 70.35(3), regarding the personal property return; sec. 70.47(7)(af), regarding income and expense information provided to the assessor and board of review; and sec. 77.265, the real estate transfer return.

K. **AVAILABLITY.** The Assessor shall maintain a local or toll free telephone service to receive calls from the Municipality or property owners five days a week from 8:00 a.m. to 4:30 p.m. excluding holidays. Internet communication is available twenty-four hours per day. The Assessor shall timely respond to all telephone inquiries within four working days or sooner. The Assessor shall copy the municipal clerk on those issues that have been raised to the clerk or board and subsequently passed on to the Assessor. The Assessor shall hold regular office hours at the City of Menasha on Tuesday from 8:00am to 12:00pm and Thursday from 12:00pm to 4:00pm.

L. **MUNICIPAL RECORDS.** The Municipality shall allow access and make available to the Assessor municipal records such as, but not limited to, previous assessment rolls and records, sewer and water layouts, permits, tax records, records of special assessments, plats, and any other maps currently in the possession of the municipality at no cost.

II. GENERAL REQUIREMENTS

A. **OATH OF OFFICE.** As the Assessor is a corporation, the person designated as responsible for the assessment shall take and subscribe to an oath or affirmation supporting the Constitution of the United States and to the State of Wisconsin and to faithfully perform the duties of Assessor. The oath shall conform to Section 19.01, Wis. Stats. and be filed with the Municipal Clerk prior to commencing duties. Assessor shall assume the appointed office of city assessor as per Wisconsin Statutes 70.05 (1) for the duration of this contract and shall perform all statutory duties appertaining to such office. As such the Municipality shall hold harmless the Assessor from all claims and liabilities relating to the assessment or taxation of property, including but not limited to claims made under Statutes 74.35, 74.37 and circuit court claims, unless otherwise specified in this agreement.

B. **QUALIFICATIONS AND CONDUCT OF PERSONNEL.** The Assessor shall provide at its own expense any personnel necessary and shall comply with the following:

1) All personnel providing services shall be currently certified in compliance with Sec. 70.05 and 73.09, Wis. Stats. and the administrative rules prescribed by the Wisconsin Department of Revenue.

2) Assessor's field representatives shall carry photo identification cards and a general letter of introduction/identification on Municipal letterhead.

3) All employees, agents, or representatives of the Assessor shall conduct themselves in a safe, sober, and courteous manner while performing services within the Municipality.

4) The Assessor shall review any complaint relative to the conduct of the Assessor's employees and take appropriate corrective action. If the Municipality deems the performance of any of Assessor's employees unsatisfactory, the Assessor shall, for good cause, remove such employees from work upon written request by Municipality.

C. **ASSESSOR PROVIDED INSURANCE AND INDEMNITY**. The Assessor agrees as follows:

1) The Assessor shall obtain and maintain during the term of this contract full coverage insurance to protect and hold harmless the Municipality which insurance is to include:

(a) Workers Compensation — State of Wisconsin requirements

(b) General Liability

General Aggregate	$ 2,000,000
Products/Completed Operations	$ 1,000,000
Each Occurrence	$ 1,000,000
Personal & Advertising	$ 1,000,000
Fire Damage	$ 200,000
Medical Expense	$ 10,000

(c) Comprehensive Auto Liability

Combined Single Limit	$ 1,000,000

2) The Assessor shall provide the Municipality with certificates for all required insurance, with the Municipality as a named insured. All insurance coverage shall contain a 10-day advance notice of cancellation to the Municipality. The Assessor shall timely pay all insurance premiums.

3) Liability for bodily injury, disability, and/or death of employees or any person or for damage to property caused in any way, directly or indirectly, by the operations of the Assessor within the Municipality shall be assumed by that Assessor and the Assessor shall indemnify and hold harmless the Municipality against all claims, actions, proceedings, damages, and liabilities, including reasonable attorneys fees, arising from or connected with the Assessor's activities in connection with the services provided to the Municipality, including but not limited to, any acts or omissions of the Assessor, the Assessor's employees, agents, representatives, and any other person doing business with Assessor. This paragraph is not to be in conflict with Sec. 893.89(4), Wis. Stats.

C. **OWNERSHIP OF RECORD**. All records prepared or maintained in connection with assessments in the Municipality shall at all times be and remain the sole property of the Municipality, including (a) all records prepared in connection with assessments in the Municipality including, but not limited to property record cards, personal property forms, maps, and any other schedules or forms, (b) all records and materials obtained from the municipality and not previously returned to include maps, and Assessor's records, and (c) materials specifically obtained and/or used for performance of assessment

work for the Municipality, to include aerial photos, maps, depth factor tables, copies of leases, correspondence with property owners, sales data, copies of real estate transfer returns, and operating statements of income property, and (d) if the record system is computerized, at a minimum, provide that the software be able to create an exportable text file of data, (e) if the municipality requires a conversion of the electronic assessment records to a neutral file format, such as a text file format or a tab delimited format, the municipality agrees to pay the actual cost of such conversion.

III. TERM AND TERMINATION

A. **TERM.** The term of this Contract is for the **2015 (October through December), 2016, 2017, and 2018 (July 31, 2018)** assessment years. The assessor shall have completed all work under this agreement on or before the second Monday of May or 30 days thereafter, excluding appearances beyond the Board of Review. The date of completion may be extended, if necessary, under the terms of this contract and by mutual consent.

B. **TERMINATION.** Either party may terminate this Contract only with cause, cause being defined as default of the other party of terms of this Contract upon sixty (60) days written notice to the other party. Upon termination by either party, Assessor shall deliver to the Municipality all records and materials in Assessor's possession used or created during this Contract. During the 60-day wind down period, both Assessor and the Municipality shall act in good faith with each other and cooperate in the orderly transfer of records.

C. **AUTOMATIC RENEWAL.** This Agreement will automatically renew for successive annual assessment years unless either party, on or before July 1 of the preceding year, notifies the other party by certified mail of their desire to non-renew.

IV. COMPENSATION

A. The Municipality shall pay the Assessor **Fifteen Thousand Dollars ($15,000) for 2015 (October through December), Sixty Thousand Dollars ($60,000.00)** for each of the 2016, 2017, and **Thirty-Five Thousand Dollars ($35,000.00) for 2018 (January through July),** assessment years for maintenance assessment services.

B. The compensation due the Assessor shall be paid in installments throughout the 2015 (October through December), 2016, 2017, and 2018 assessment years.

C. The Municipality will not be billed for additional expenses such as postage, mileage, or supplies.

V. SIGNATURES

Mark Brown
President
Associated Appraisal Consultants, Inc.

9/14/2015
Date

Authorized Signature
City of Menasha, Calumet/Winnebago Counties

Date

Our Mission.....

To provide our municipal clients

the highest standard of assessing services.

We do so by following sound assessing methodology,

developing municipal equity without bias and

providing a professional, courteous staff.

Associated Appraisal Consultants Quick Facts

History
Associated Appraisal has been in the mass appraisal business since 1959. Our primary focus is municipal assessment through maintenance and revaluation programs. Our client base is divided between providing services directly to municipalities by acting as the statutory assessor or supporting the local municipal assessor.

Experience
With over 55 years of experience, Associated Appraisal has provided consulting/assessment services throughout Wisconsin. We have had the opportunity to reassess/revaluate municipalities that have increased or decreased in value. With the diversity of our client base ranging from the shores of Lake Geneva to the backwoods of northern Wisconsin, we are aware of the many complexities of assessment practices. This diversity and experience is what gives Associated Appraisal the leading edge.

Office and Staff
When you call our office, Monday through Friday, you will be greeted by a friendly voice ready to direct your inquiry to an appropriate team member who will willingly assist you. We also offer internet communication twenty-four (24) hours per day. Each municipal client has a primary point of contact, the project technician, providing a consistent relationship with The Associated Appraisal team. Our corporate office is located in Appleton with satellite offices in Lake Geneva (Southern) and Hurley (Northern).

Public Relations
We routinely utilize printed assessment informational materials that are made available to property owners. Clients are informed of the progress of the assessment work for use in newsletters and newspaper articles. For revaluation programs, we can provide knowledgeable speakers to attend organizational and municipal meetings.

Assessment Documentation
Assessment documentation is what sets Associated Appraisal above the rest. For property owners demanding answers to assessment methodology, we document all aspects of the revaluation project. The property record includes land data, improvement data, sales data, improvement pictures, appropriate appraisal reports, property maps and any other documentation needed to defend values. A master Revaluation Report Book is also prepared that is frequently used by the Board of Review to aid in understanding the methodology. Included are complete reports for assessment levels, sales information and pictures of sale properties, all database data for valuation tables, a detailed sales analysis as well as other reports needed to support values.

Identification and Image
Associated Appraisal maintains a professional image in the field, at the Open Book, and Board of Review hearings. For identification in the field, our staff members carry letters of introduction, wear Associated Appraisal company ID tags and apparel, and drive red company trucks clearly identified as Associated Appraisal fleet vehicles.

Computer Software
Our computer network is a Novell Network. Associated Appraisal utilizes nearly all assessment software and can adapt to most municipal needs. Our CAMA software utilizes the market approach to value for residential properties and cost tables for commercial properties. Providing our clients with information via the Internet is also readily available.

Why Choose Associated Appraisal
With our level of experience, our goals are very clear. We are in the assessment business, full time, providing our clients with professional and reliable service. Our client base over the years has provided us with many diverse appraisal opportunities giving us the experience to confidently accept any job and meet all expectations of our clients.

References

City of Neenah
Chris Haase
Dir. Of Comm. Development & Assessments
211 Walnut Street
Neenah, WI 54956
920-886-6125

City of Green Lake
Barbara Dugeneske
Clerk/Treasurer
PO Box 216
Green Lake, WI 54941
920-294-6912

City of Sturgeon Bay
Marty Olejniczak
Community Development Director
421 Michigan Street
Sturgeon Bay, WI 54235
920-746-6908

City of Waupun
Kyle Clark
Mayor
201 E. Main Street
Waupun, WI 53963
920-324-7900

City of Reedsburg
Anna Meister
Clerk/Treasurer
PO Box 490
Reedsburg, WI 53959-0490
608-524-6404 ext. 235

City of Shawano
Lorna Marquardt
Mayor
127 Sawyer Street
Shawano, WI 54166
715-526-6152

City of Fort Atkinson
Matt Trebatoski
Administrator/Clerk/Treasurer
101 N. Main Street
Fort Atkinson, WI 53538
920-536-7760

City of Menasha
Peggy Steeno
Administrator Services Director
140 Main Street
Menasha, WI 54952-3190
920-967-3630

City of Pewaukee
Kelly Tarczewski
Clerk/Treasuer
W240 N3065
Pewaukee, WI 53072
262-691-0770

City of Wisconsin Dells
Nancy Holzem
Clerk/Administrator
300 LaCrosse Street
Wisconsin Dells, WI 53965
608-254-2012

Village of Sherwood
Sue Williams
Clerk/Treasurer
PO Box 279
Sherwood, WI 54169
920-989-1589

City of Plymouth
Patty Huberty
Clerk/Treasuer
PO Box 107
Plymouth, WI 53073
920-893-1271

City of Watertown
Cindy Rupprecht
Clerk/Treasuer
PO Box 477
Watertown, WI 53094
920-262-4009

Village of Little Chute
James Fenlon - Administrator
108 W. Main Street
Little Chute, WI 54140
920-788-7394

More references available upon request.

City of Menasha

RFP Proposal - 2015

Comments from References of ASSOCIATED APPRAISAL CONSULTANTS, INC.

Randy Friday, Village Administrator
Village of Sherwood

"We have used Associated Appraisal for a number of years now. They have on-line access which we have found useful - and I direct any & all questions to them. This has worked out well. I've only ever heard minor cajoling from I believe 2 property owners in my 2 1/2 years here. And, out Open Book is quite quiet. So, long story short, I would give them a very good recommendation from Sherwood perspective."

John Dougherty, City Administrator
City of Reedsburg

"Associated Appraisal has done assessor services here for a number of years and we are very happy with their services. Last year we had two citizens come to BOR but neither of them bothered to contact AAC or come in during open book, nor did they have any comparables. They just didn't like their assessment."

Thomas Stoffel, Comptroller/Treasurer
City of Menasha

"The City of Menasha has been using the services of Associated Appraisal Consultants since 2007. At the time our assessment department was staffed with an assessor and a deputy assessor. Our assessor left to take another job and our deputy retired. That appeared to be the best time for the City to look at privatizing that function and hopefully achieve a cost savings. There were vocal concerns from council members about losing service for the taxpayer; they could not just walk in and find someone in that department and other unfounded comments. Associated was given a one year contract, in effect a testing period, to see if this was a viable way to run the assessment function. At the end of that year, opposition on the council had faded, few if any comments were received from the public and Associated was given a four year contract which runs through 2011.

In my opinion it is working well. There has been some shakeout in that some jobs performed by the assessors, but not really part of the assessment function, had to be taken over by other departments. But Associated has been very good to work with, Mr. John Holton and Mr. Mark Brown are the City's principal contacts and are always ready to sit down and talk about any problems that do come up, though they rarely do. I would recommend them for any appraisal or assessment service you are looking to have performed. As for the cost savings, the 2006 City budget for the assessor's function was $135,061; the 2010 City budget for the assessor's function is $71,130.00

Dale D. Darling, City Clerk/Treasurer
City of Wisconsin Dells

"We have used Associated Appraisal for about the last 14 years for both annual maintenance and 2 revaluations. They have provided the City good service during those years at a fair cost. We refer most calls relating to valuations from our property owners directly to them. They has an 800 number in which the property owners can contact them directly and receive a prompt response to their inquiry. Since the City is in four different counties Associated Appraisal deals with a variety of issues with a lot of

commercial property owners. They have a good staff and do a nice job at Open book and Board of Review. Thus, for the City of Wisconsin Dells it has worked out well in having Associated Appraisal as our city Assessor."

Rebecca Houseman LeMire, Administrator/Clerk-Treasurer
Village of Darien

"The Village of Darien contracts with Associated Appraisal Consultants, Inc., to fulfill the statutory duties of the Assessor for the Village. Mr. Mack has demonstrated expertise within his field. He is willing and able to answer any questions that the Board of Review, The Village Board, or I may have regarding his company's services and the statutory obligations for each jurisdiction his represents. Because he represents many different municipalities in Wisconsin, Mr. Mack is able to offer advice and experience that a staff assessor may not have."

John L. Zouski, Village President
Village of Plainfield

"We have been very pleased with the service that your company has provided as our assessor. Every staff member we have worked with have conducted themselves in a professional and courteous manner. During the Open Book, the concerns of our residents were dealt with in a fair and courteous manner. At the Board of Review, your knowledge and professionalism were greatly appreciated by the board members. Questions and calls from our residents are always answered in a timely fashion. We would recommend Associated Appraisal Consultants, Inc. without hesitation to any municipality for assessment work.

Patricia Huberty, City Clerk Treasurer
City of Plymouth

"On behalf of the City of Plymouth, I would like to take the opportunity to send this letter of appreciation and high recommendation regarding the assessing services the City has received since contracting with Associated Appraisal Consultants, Inc. almost one year ago. We ere in a very stressful situation with a previous assessor and your employees came on board and very quickly and very professionally got us back on track. Our Board of Review is completed for 2015 with no objections to be hear. Board Members were very impressed with the professionalism. We look forward in continuing this business relationship and would highly recommend Associated Appraisal Consultants, Inc. for assessment services."

Felicia Germain, Village Administrator/Clerk
Village of Somerset

"I would like to take the opportunity to send this letter of appreciation and high recommendation regarding the assessing services the Village has received since contracting with Associated Appraisal Consultants. I appreciated the respectful interactions they have with citizens' concerns. They take the time to offer a through explanation. I have enjoyed working with Associated Appraisal Consultants and highly recommend them for Assessment Services."

Reservations or Expectations to Specifications

Associated Appraisal Consultants, Inc. holds no reservations or expectations to the specifications found in this Request for Proposal.

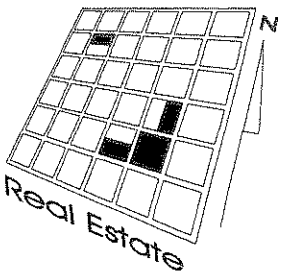
The quoted price for Annual Full Value Maintenance services provided by Associated Appraisal Consultants, Inc. includes the following provisions:

- Associated Appraisal Consultants, Inc. shall use the Market Drive CAMA software for real estate, mobile homes and personal property valuation. The City currently uses this software to maintain and value electronic assessment records.
- All electronic assessment records shall be completed to include all building attribute data, including a digital copy of the primary sketch, and photos of all structures.
- All electronic assessment records shall be updated and maintained to include sales data, building permits, owner correspondence, and recent building permit data.
- Twenty-Five (25%) percent of taxable parcels shall be physically inspected on an annual basis.
- Regular office hours shall be conducted on Tuesday from 8:00am to 12:00pm and Thursday from 12:00pm to 4:00pm.

The above provisions shall assist the City in maintaining a complete and accessible database of electronic assessment records in a format that is both currently familiar to the City staff and useful to multiple departments within the City of Menasha.

Associated Appraisal Consultants, Inc.

Appleton ■ Hurley ■ Lake Geneva



Mark A. Brown

Associated Appraisal Consultants, Inc.
1314 West College Avenue
Appleton, WI 54914

SUMMARY: Assessor with vast experience performing reviews, inspections and appraisals of property using independent discretion and judgment within the guidelines set forth by statutory requirements and department policies and procedures.

Summary of Qualifications

- Ten years experience in appraisal and assessment.
- Considerable ability to communicate complex information tactfully and effectively both orally and in writing with state regulatory agencies, county regulatory agencies, elected officials, municipal staff, and the general public.
- In-depth knowledge of accepted principals, methods and techniques of property appraisal including computerized assessment systems.
- Extensive knowledge of all laws and regulations pertinent to local tax assessments.
- Strong knowledge of real estate property values and land economics.
- Ability to accurately perform mathematical calculations, analyze data, and prepare reports.
- Strong project management skills including the ability prioritize projects and to organize, plan and direct the work of staff.
- Ability to read and interpret a wide variety of legal documents.

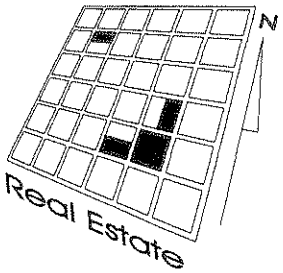
Professional Experience

Associated Appraisal Consultants, Inc., Appleton, Wisconsin

2014 - Present
President

2005 – 2014
Director of Project Management, Certified Assessor Level III

- Responsible for the management of the assessment staff to ensure revaluation projects are completed accurately and in a timely manner.
- Advise on the policy and methodology used to determine estimated fair market value and assign its proper classification in accordance with Wisconsin Statues.
- Advise on the proper methodology to appraise the value of agricultural, commercial, residential, and personal properties.
- Provide quality control and supervision of the final output and ensure that proper documentation and records are maintained.
- Research and keep current on issues and developments that impact the municipalities' assessment function.



- Direct reassessment and appraisal programs on all agricultural, commercial, residential, and personal properties within the municipalities' limits.
- Define and organize the procedure to reevaluate neighborhoods.
- Analyze property sales through the use of regression analysis.
- Analyze valuation data of commercial and residential properties.
- Verify sales and assessment ratio studies.

Mark Brown Resume (continued)

- Defend assessed values at Board of Review, 70.85 Appeals to the Wisconsin Department of Revenue, and Circuit Court.
- Works as part of the management team to efficiently operate the company.

2004 – 2005
Staff Appraiser

- Appraised all real property for accuracy of records, construction classification and computed appraisal of property.
- Recorded and updated property record cards by measuring and listing improved and vacant parcels.
- Gathered and verified assessment information.

Education

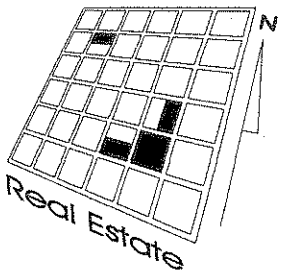
St. Norbert College, De Pere, Wisconsin Bachelor of Business Administration, 2004

Certifications

Assessor III Certification – WI60828CA – 2012
Assessor II Certification – WI60828CA - 2005
Assessment Technician Certification - 2004

Continuing Education

Equalization Sales Validation & Economics	March, 2014
Real Estate Assessments	October, 2012
Market Drive 2013 Overview & Sales	October, 2012
Preparing & Filing MAR & TAR & Configuring Cost Models	October, 2012
Mobile Home Municipal Permit Assessments & Personal Property Assessments	October, 2012
AAR Report	October, 2012
Listing & Valuing Commercial Properties	October, 2012
IAAO – Course 101 – Fundamentals of Real Property Appraisal	March, 2012
IAAO Course 311 – Residential Modeling Concepts	March, 2012
IAAO Course 300 - Fundamentals of Mass Appraisal	October, 2011
IAAO Course 112 - Income Approach to Valuation	August, 2011
DOR's USPAP Compliance & Reporting Standards for Assessors	June, 2011
How to Value & Defend Triple Net Lease Properties	March, 2011
Current Issues in Commercial Real Estate	March, 2011



Market Analysis and Highest and Best Use	March, 2011
2010/2011 National USPAP Update	October, 2010
USPAP 15 Hour National Course 2010-11	October, 2010
Discounted Cash Flow & Band of Investment	June, 2010
Analyzing Commercial Lease Clauses	March, 2010
Distressed Property Considerations	March, 2010
Appraising Apartments – 74.37 Appeals	September, 2009
Valuation of Large & Unique Buildings	September, 2009
Reconstructing Income & Expense	September, 2009
Preparing for a S. 70.85 Assessment Appeal	April, 2009

Mark Brown Resume (continued)

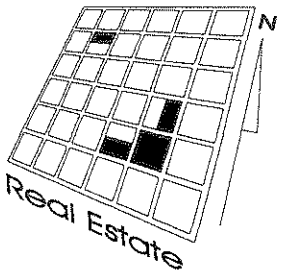
Using the Latest Mapping & GIS Tech. For Appraisal Purposes	April, 2009
Sales Validation with Foreclosure Issue Focus	March, 2009
Wisconsin Tax Policy for Assessors	March, 2009
ABCs of Environmental Contamination	December, 2008
Board of Review: An Assessment Perspective	March, 2008
Mega Dairy Farms	September, 2007
Introduction to Subsidized Housing	September, 2007
Assessing 101	April, 2005
Correction of Assessment Errors-Statutory Procedures	April, 2005
Appraising Convenience Stores	March, 2005

Professional Memberships

International Association of Assessing Officers
Wisconsin Association of Assessing Officers

Associated Appraisal Consultants, Inc.

Appleton ■ Hurley ■ Lake Geneva



Dean W. Peters
Associated Appraisal Consultants, Inc.
1314 West College Avenue
Appleton, WI 54914

SUMMARY: A skilled and experienced municipal Assessor, having successfully performed over 30 full-scale municipal revaluations, and successfully served as chief assessor for towns, villages and cities throughout the state of Wisconsin.

Summary of Qualifications

- Seventeen years experience in appraisal and assessment.
- In-depth knowledge of professionally accepted appraisal practices for residential, commercial, multi-family and agricultural property.
- Full working knowledge of laws and regulations pertaining to local property tax assessment.
- Strong knowledge of real estate property values and land economics.
- Extensive experience with analysis of trends in market value based on real estate sales.
- Familiarity with variations in building construction costs throughout Wisconsin.
- Extensive experience with appraisal of high-value lakefront property.
- Successful experience in defending valuations at Open Book, Board of Review, Department of Revenue appeals and circuit court.
- Experience working with a variety of mass appraisal computer systems, including Market Drive, Microsolve, GVS, MCost, and others.
- Ability to effectively communicate complex information both orally and in writing with state government, county government, elected officials, municipal staff, the media, and the general public.
- Involved in managing, training and educating of assessment staff.
- Organizational skills to effectively prioritize and manage multiple work projects.

Professional Experience

Associated Appraisal Consultants, Inc., Appleton, Wisconsin

2008 – Present
Director of Project Management, Certified Assessor Level III

- Responsible for the management of assessment staff to ensure that annual assessment work is completed accurately and in a timely manner.
- Implement policies and training in response to changes in property tax law and assessment practices.
- Supervise the creation of computerized assessment databases to ensure accuracy, completeness and compatibility with statistical analysis.
- Give expert advice to other assessors and staff regarding appraisal practices and assessment law.
- Work as part of the management team to efficiently operate the company.

2003 -- 2008
Project Manager

- Perform all statutory duties of the municipal assessor on an annual basis.
- Appraise all types of real estate according to professionally accepted appraisal practices.

2003 – 2008 Project Manager (continued)

- Act as primary contact for municipal client, including answering questions, speaking at council meetings, composing letters, and educating municipal officials about the assessment process.
- Provide training and supervision of assessment staff throughout the assessment process.
- Monitor the Municipality's assessment compliance level with respect to Department of Revenue equalized value.
- Perform annual sales ratio studies for residential commercial and agricultural property.
- Defend assessed values at Board of Review, Department of Revenue appeals and circuit court.
- Manage all stages of municipal revaluation programs and monitor the process for accuracy, professionalism and quality control.

1999 - 2003
Staff Appraiser

- Physically inspect and appraise residential, agricultural and commercial properties.
- Analyze and develop land values based on stratified sales data.
- Appraise residential property using the cost approach and sales comparison approach
- Explain and discuss assessed values with property owners during the Open Book process.

Education

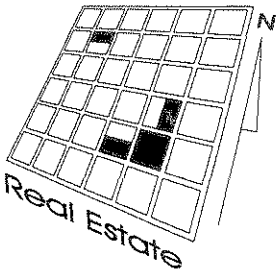
University of Wisconsin, Madison — Bachelor of Arts, 1999

Certifications

Assessor III Certification – WI77308CA - 2010
Assessor II Certification – WI77308CA - 2003
Assessor I Certification – WI77308CA - 2001

Continuing Education

IAAO Course 112 – Income Approach to Valuation II	December, 2014
IAAO Course 102 – Income Approach to Valuation	September, 2013
IAAO 932 Reconstructing Income & Expense Statements	March, 2013
Instructor - Three Appraisal Reports Conforming to	September, 2012
USPAP Standard 6	June, 2012
Successful Public Relations for Assessors	December, 2012
IAAO Course 311 – Residential Modeling Concepts	March, 2012
IAAO Course 101 – Fundamentals of Real Property Appraisal	March, 2012
Unique Commercial Buildings	March, 2012



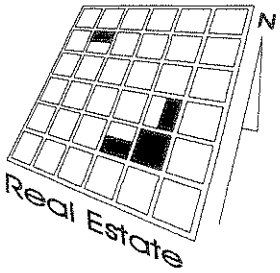
IAAO Course 400 – Assessment Administration	December, 2011
IAAO Course 300 – Fundamentals of Mass Appraisal	October, 2011
USPAP 15 Hour National Course 2010-11	October, 2010
Instructor - Unique Commercial Buildings	September, 2010
Discounted Cash Flow & Band of Investment	June, 2010
Downtown Redevelopment in a Tax Incremental District	September, 2009
Property Tax Exemptions	September, 2009
Assessor Requirements & the Wisconsin Property Assessment	September, 2009
Preparing for a S. 70.85 Assessment Appeal	April, 2009
Using the Latest Mapping & GIS Tech. for Appraisal Purposes	April, 2009
Sales Validation with Foreclosure Issue Focus	March, 2009
Wisconsin Tax Policy for Assessors	March, 2009
Mega Dairy Farms	September, 2007
Appraising Convenience Stores	March, 2005

Professional Memberships

International Association of Assessing Officers
Wisconsin Association of Assessing Officers

Associated Appraisal Consultants, Inc.

Appleton ■ Hurley ■ Lake Geneva



Luke T. Mack
Associated Appraisal Consultants, Inc.
1314 West College Avenue
Appleton, WI 54914

Summary of Qualifications

SUMMARY: A skilled and experienced municipal Assessor, having successfully performed over 30 full-scale municipal revaluations, and successfully served as chief assessor for towns, villages and cities throughout the state of Wisconsin.

Summary of Qualifications

- In depth knowledge of professionally accepted appraisal practices for residential, commercial, multi-family and agricultural property.
- Full working knowledge of laws and regulations pertaining to local property tax assessment.
- Strong knowledge of real estate property values and land economics.
- Extensive experience with analysis of trends in market value based on real estate sales.
- Familiarity with variations in building construction costs throughout Wisconsin.
- Extensive experience with appraisal of high-value lakefront property.
- Successful experience in defending valuations at Open Book, Board of Review, Department of Revenue appeals and circuit court.
- Experience working with a variety of mass appraisal computer systems, including Market Drive and GVS, among others.
- Ability to effectively communicate complex information both orally and in writing with state government, county government, elected officials, municipal staff, the media, and the general public.
- Involved in managing, training and educating of assessment staff.
- Organizational skills to effectively prioritize and manage multiple work projects.

Professional Experience

Associated Appraisal Consultants, Inc., Appleton, Wisconsin

2013 – Present
Project Manager, Assessor II

- Physically inspect interior and exterior of residential, agricultural and commercial properties.
- Explain and discuss assessed values with property owners during the Open Book process.
- Create updated property record cards and digital computer records.
- Review property assessments.
- Review mapping, DNR wetlands and investigate any zoning or buildable lot restrictions.
- Record and file information on property sales, property splits, building permits, class changes and new construction.
- Create computerized sketches of dwellings and commercial buildings on Apex software.

- Create maps and map detailing relative to legal descriptions of real estate.
- Perform and monitor data entry of property records into computerized format.

Luke Mack Resume (continued)

- Balance the assessment roll with the County Tax Lister to ensure exact correctness of assessments for tax billing.
- Prepare assessment notices and mail to taxpayers.
- Answer questions and concerns from taxpayers, realtors and municipal officials

2011 – 2013
Project Technician Supervisor

- Responsible for training new and current technicians on changes in statutes, policies and CAMA software updates/upgrades
- Liaison between project managers and technicians
- Responsible for oversight of day to day activities of project technicians
- Responsible for answering questions in absence of project managers
- Responsible for working with the Department of Revenue on submission of reports including Municipal Assessment Report (MAR) and TID Assessment Report (TAR)

2007 – 2011
Project Technician

- Maintain and balance computerized assessment databases.
- Record and file information on property sales, property splits, building permits, class changes and new construction.
- Create computerized sketches of dwellings and commercial buildings on Apex software.
- Create maps and map detailing relative to legal descriptions of real estate.
- Perform and monitor data entry of property records into computerized format.
- Make all pertinent changes to the property record and assessment roll after field work is completed.
- Balance the assessment roll with the County Tax Lister to ensure exact correctness of assessments for tax billing.
- Prepare assessment notices and mail to taxpayers.
- Create the annual assessors final report for the Department of Revenue.
- Answer questions and concerns from taxpayers, realtors and municipal officials.

Education

University of Wisconsin Oshkosh – Oshkosh, Wisconsin

Certifications

Assessor II Certification - WI71164CA - 2020
Assessor I Certification – WI71164CA - 2017

Associated Appraisal Consultants, Inc.
Appleton ■ Hurley ■ Lake Geneva

Assessment Technician Certification – # WI71164CA - 2017

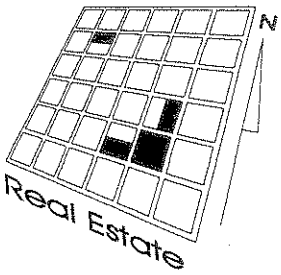
Continuing Education

IAAO Course 101 – Fundamentals of Real Property Appraisal	October, 2013
Market Drive 2013 Overview & Sales	October, 2012
Real Estate Assessments	October, 2012
Preparing & Filing MAR & TAR & Configuring Cost Models	October, 2012
Listing & Valuing Commercial Properties	October, 2012
Using the Electronic Real Estate Transfer Return System	September, 20

1314 W. College Ave. ■ P.O. Box 2111 ■ Appleton, WI 54912-2111 ■ (920) 749-1995 ■ Fax: (920) 731-4158

Associated Appraisal Consultants, Inc.

Appleton ■ Hurley ■ Lake Geneva



Mark R. Verhyen
Associated Appraisal Consultants, Inc.
1314 West College Avenue
Appleton, WI 54914

SUMMARY: A skilled and experienced municipal assessor and assessment technician. Currently in a leadership role within the Personal Property Tax Department at Associated Appraisal Consultants, Inc. Prior work experience includes work in the construction field.

Professional Experience

Associated Appraisal Consultants, Inc., Appleton, Wisconsin

2003 – Present
Mobile Home and Personal Property Administrator

- Compile the annual personal property assessment roll.
- Discover and catalog new personal property accounts for local taxable businesses.
- Create, mail, and review the annual personal property returns.
- Determine taxability or exemption of reported personal property.
- Balance the personal property assessment roll with the County Tax Lister to ensure exact correctness of assessments for tax billing.
- Administer mobile home parking permit fees for manufactured home communities.
- Physically inspect, measure and catalog mobile homes for municipal records.
- Appraise mobile homes using valuation schedule with adjustments determined by sales ratio studies.
- Mail, receive and review lottery credit eligibility reports.
- Supervise the personal property assistant and personal property clerk.
- Answer questions and concerns from taxpayers, realtors and municipal officials.

Education

Fox Valley Technical College – Appleton, Wisconsin

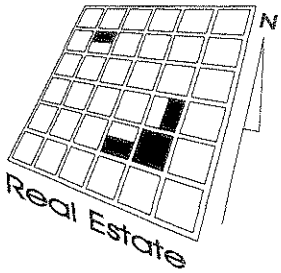
Certifications

Assessor I Certification - WI98684CA
Assessment Technician Certification – WI98684CA

Continuing Education

Mobile Home Municipal Permit Assessments & Personal Property Assessments	October, 2012
AAR Report	October, 2012
Personal Property 201	October, 2012
Personal Property Overview	October, 2004
Dealing with the Taxpayer from Hell (and Other Coping Strategies)	October, 2004

Associated Appraisal Consultants, Inc.
Appleton ■ Hurley ■ Lake Geneva



Professional Memberships

Wisconsin Housing Alliance

1314 W. College Ave. ■ P.O. Box 2111 ■ Appleton, WI 54912-2111 ■ (920) 749-1995 ■ Fax: (920) 731-4158

ASSOC01 OP ID: JV

CERTIFICATE OF LIABILITY INSURANCE

DATE (MM/DD/YYYY) 11/24/14

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).

PRODUCER
ADEMINO & ASSOCIATES INC
DAVID ADEMINO
1001 TRUMAN P O BOX 99
KIMBERLY, WI 54136-0099
DAVID VAN BOOGARD

920-734-3110
920-734-6027

CONTACT NAME:
PHONE (A/C, No, Ext):
FAX (A/C, No):
E-MAIL ADDRESS:

INSURER(S) AFFORDING COVERAGE	NAIC #
INSURER A : GENERAL CASUALTY	24414
INSURER B : UNDERWRITERS AT LLOYDS, LONDON	
INSURER C :	
INSURER D :	
INSURER E :	
INSURER F :	

INSURED
ASSOCIATED APPRAISAL CONSULTANTS INC
PO BOX 2111
APPLETON, WI 54912

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 INSR	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS		
A	GENERAL LIABILITY X COMMERCIAL GENERAL LIABILITY CLAIMS-MADE X OCCUR GEN'L AGGREGATE LIMIT APPLIES PER: POLICY PRO-JECT LOC	X		CFB 0859674	11/01/14	11/01/15	EACH OCCURRENCE	$	1,000,000
							DAMAGE TO RENTED PREMISES (Ea occurrence)	$	100,000
							MED EXP (Any one person)	$	1,000
							PERSONAL & ADV INJURY	$	1,000,000
							GENERAL AGGREGATE	$	2,000,000
							PRODUCTS - COMP/OP AGG	$	2,000,000
								$	
A	AUTOMOBILE LIABILITY X ANY AUTO ALL OWNED AUTOS SCHEDULED AUTOS HIRED AUTOS NON-OWNED AUTOS			CBA 0859671	11/01/14	11/01/15	COMBINED SINGLE LIMIT (Ea accident)	$	1,000,000
							BODILY INJURY (Per person)	$	
							BODILY INJURY (Per accident)	$	
							PROPERTY DAMAGE (Per accident)	$	
								$	
A	X UMBRELLA LIAB X OCCUR EXCESS LIAB CLAIMS-MADE DED X RETENTION $ 10,000			CCU 0859673	11/01/14	11/01/15	EACH OCCURRENCE	$	3,000,000
							AGGREGATE	$	3,000,000
								$	
A	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY ANY PROPRIETOR/PARTNER/EXECUTIVE OFFICER/MEMBER EXCLUDED? Y / N (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	N / A		CWC 0859672	11/01/14	11/01/15	X WC STATU-TORY LIMITS OTH-ER		
							E.L. EACH ACCIDENT	$	100,000
							E.L. DISEASE - EA EMPLOYEE	$	100,000
							E.L. DISEASE - POLICY LIMIT	$	500,000
B	ERRORS & OMISSIONS			PGIARK03504-00	01/12/14	01/12/15	$5000 DED		1,000,000
A	HIRED AUTO PHY DAM			CBA 0859671	11/01/14	11/01/15	$500 DED		50,000

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

CERTIFICATE HOLDER

ANTIG-1

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
DAVID VAN BOOGARD

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October 1, 2015

AMENDMENT

Proposal for City of Menasha

Page 3 - #I

A. The Assessor shall prepare and distribute annual personal property statements to all businesses; postage is at the **Municipality expense.** By May 1st each year the Assessor will review statements and follow up with un-filed or incorrect statements. The Assessor shall determine the appropriate assessment. The Assessor shall exercise particular care so that personal property as a class on the assessment roll bears the same relation to statutory value as real property as a class.

Page 5 - IV/#C

C. The Municipality will not be billed for additional expenses such as mileage or supplies. **The Municipality will be billed for postage.** Postage expenses shall not exceed **One Thousand, Seven Hundred Dollars ($1,700.00) per year.**

*Language change to reflect previous contract with the City of Menasha.

Signed

Mark Brown
President
Associated Appraisal Consultants

_____
City of Menasha
Calumet/Winnebago Counties
_____, 2015

ACCURATE
DELIVERING MUNICIPAL ASSESSMENTS

Agreement for Assessment Services

Prepared for:

City of Menasha

By

Accurate Appraisal, LLC.

1428 Midway Road P.O. Box 415 Menasha, WI 54952-0415
phone 920.749.8098 \ 800.770.3927 fax 920.749.8099 info@accurateassessor.com

AGREEMENT FOR ASSESSMENT SERVICES

Section I

This agreement made this _____ day of _____, 2015 by and between the City of Menasha, Calumet and Winnebago Counties, State of Wisconsin, party of the first part, hereinafter referred to as "Client",

AND

ACCURATE APPRAISAL LLC., PO BOX 415, MENASHA, WI 54952, party of the second part, hereinafter referred to as "Accurate".

SCOPE OF SERVICES

Accurate shall provide the Client with assessing services by Wisconsin Department of Revenue Certified Personnel for the years 2015 (final three months) through July 2018 assessment years which includes the following:

1. Accurate shall update and maintain 100% real property assessment records for the Client. Said service shall include all assessing services so as to comply with all applicable Wisconsin statutes, codes, rules, and/or regulations, including the assessment of all new construction, remodeling, additions and changes relating to improvements removed for any reason such as fire, demolition, etc. through building permits. Accurate shall reapportion value brought about through property splits. In addition, the contract goal shall be that 100% of all improved parcels shall be inspected in a four year inspection cycle commencing January 1, 2016.

2. Accurate shall prepare and mail personal property blotters from a list supplied by the Client of the accounts to be assessed. Accurate will analyze returned personal property blotters from the merchants in order to establish the proper assessment.

3. Accurate shall, without additional expense to the Client, be required to attend Open Book and all Board of Review meetings and shall be responsible for defending all assessments. The Open Book meeting shall be conducted as needed. The meetings shall be scheduled by Accurate with the Clerk. The Open Book meetings shall be completed no later than the agreement date specified in Section III of this agreement.

4. Accurate shall enter real estate and personal property assessments in the current assessment roll so that it may be submitted to the Board of Review.

5. Accurate shall retain the right to employ additional certified personnel at Accurate's expense as deemed necessary to complete the assessment roll in a timely manner. Responsibility for the content and accuracy of the assessment roll regardless of the use of other personnel shall, however, rest with Accurate.

6. The Client's responsibilities will be to supply Accurate with adequate office space in or near the Client's Hall. Items to be mailed such as, but not limited to, assessor's final report and personal property blotters will be the responsibility of Accurate.

7. The Client will hold harmless Accurate from third claims and liabilities due to the assessment of property except claims or liabilities, which result from the intentional or negligent acts or omissions of Accurate, its employees, agents and representatives, shall be the responsibility of Accurate.

8. This agreement between the Client and Accurate shall be for the aforementioned assessment year beginning October 1st, 2015 and ending July 31st, 2018. It is expected the work will commence with the mailing of personal property blotters and be completed after the final adjournment of the Board of Review and any necessary follow up questions and/or work because of appeals of Board of Review decisions.

9. Accurate shall submit monthly invoices based upon a percentage complete. The Client reserves the right to retain a 10% holdback pending final completion of all terms and conditions of the contract.

10. Accurate shall provide advice and opinion for assessment matters and will defend values through the appeal process beyond the Open Book and Board of Review.

11. Accurate shall complete its Open Book hearings under this agreement no later than the agreement date, specified in Section III of this agreement, except for delays caused by the Client, county or state. Accurate may request a thirty-day extension to the contract upon written agreement with the Client.

12. Accurate shall maintain full insurance coverage to protect and hold harmless the Client. Limits of liability shall be not be less than the amounts listed below in this contract:

INSURANCE COVERAGE

General Liability	
General Aggregate	$ 4,000,000
Each Occurrence	$ 2,000,000
Personal & Adv Injury	$ 2,000,000
Products-Comp/Op Agg	$ 4,000,000
Fire Damage	$ 300,000
Medical Expense	$ 10,000

13. Accurate shall consider the cost approach, market approach, and income approach in the valuation of all land and improvements where applicable.

14. Accurate shall use Computer Assisted Mass Appraisal software to accurately provide the Client with records of the maintenance and revaluation. For both residential and commercial valuation, Prolorem software, will be utilized following market data, Volume II of the Assessor manual and Marshall & Swift cost tables. The yearly maintenance fee associated with the use of any program will be at no additional cost to the Client. The data will be available to the public on accurateassessor.com; building data and appointment scheduling will also be available at no additional expense to the Client.

15. Photographs of all improved parcels will be taken digitally at no additional expense to the Client.

16. All expenses incurred by Accurate during the contract such as postage, phone calls, etc…., will be at no additional expense to the Client.

17. Accurate will promote understanding of the assessment process with taxpayers and the Client. The Client and Accurate shall work to maintain good public relations throughout the assessment program.

18. Office hours will be held at City Hall every Tuesday from 8-12 pm and every Thursday from 12-4 pm or equivalent hours as agree to by the Client and Accurate.

Section II

Parcel Totals:

Residential Total = 5,901

Residential Improved = 5,630

Commercial Total = 424

Commercial Improved = 346

Manufacturing Total = 39

Manufacturing Improved = 39

Agricultural = 13

Undeveloped = 2

Agriculture Forest = 1

Forest Lands = 2

Personal Property Accounts total = 427

Section III

Agreement for Maintenance

Provided by Accurate Appraisal, LLC.

For

City of Menasha, Winnebago & Calumet Counties for the assessment years 2015-2018

Dated this _____ day of _____ 2015.

Agreement completion date of July 31st, each year

Fee for services rendered:

Accurate shall be paid the sum of:

2015-2018 Maintenance = $54,500 per year

This is broken down as $13,500 for the remainder of 2015, $54,500 for each year 2016-2017 and $41,000 for 2018.

_____ _____

Lee T. De Groot
Member
Accurate Appraisal, LLC.

Date

_____ _____

Authorized Client Signature

Date

IMPORTANT INFORMATION

1. Telephone Numbers
   - 920-749-8098
   - 800-770-3927

2. Fax Number
   - 920-749-8099

3. E-Mail Address
   - question@accurateassessor.com

4. Mailing Address
   - PO Box 415, Menasha, WI 54952
   - 1428 Midway Rd., Menasha, WI 54952

5. Website
   - www.accurateassessor.com

ACCURATE APPRAISAL, LLC CURRENT CLIENTS

MUNICIPALITY	TYPE	JOB TYPE	COUNTY	ACQUIRED	CONTACT	PHONE #
Menasha	Town	MAINTENANCE	Winnebago	2015	Karen Backman	920-720-7149
Harrison	Village	MAINTENANCE	Calumet	2013	Travis Parish	920-989-1062
Harrison	Town	MAINTENANCE	Calumet	2007	Travis Parish	920-989-1062
Buchanan	Town	MAINTENANCE	Outagamie	2009	Joel Gregozeski	920-734-8599
Combined Locks	Village	MAINTENANCE	Outagamie	2006	Racquel Giese	920-788-7740
Kimberly	Village	MAINTENANCE	Outagamie	2008	Rick Hermes	920-788-7500
Dale	Town	MAINTENANCE	Outagamie	2007	Jennifer DeZeeuw	920-779-4609
De Pere	City	MAINTENANCE	Brown	2005	Dave Hongisto	920-339-4053
Seymour	City	MAINTENANCE	Outagamie	2006	Susan Garsow	920-833-2209
Bovina	Town	MAINTENANCE	Outagamie	2011	Chuck Pluger	920-986-3224
New London	City	MAINTENANCE	Outagamie/Waupaca	2010	Sue Tennie	920-982-8500
Dayton	Town	FULL REVALUATION	Waupaca	2015	Judy Suhs	715-258-0930
Brillion	City	MAINTENANCE	Calumet	2002	Lori Gosz	920-756-2250
Chilton	City	MAINTENANCE	Calumet	2002	Helen Schmidlkofer	920-849-2451
Caledonia	Town	MAINTENANCE	Columbia	2009	Angeline Edgar	608-742-4801
Cambria	Village	MAINTENANCE	Columbia	2002	Lois Frank	920-348-5443
Friesland	Village	MAINTENANCE	Columbia	2006	Marcia Dykstra	920-348-5156
Lodi	City	MAINTENANCE	Columbia	2005	Adele Van Ness	608-592-3247
Lodi	Town	MAINTENANCE	Columbia	2009	April Goeske	608-592-4868
Pardeeville	Village	MAINTENANCE	Columbia	2002	Marlo Gustafson	608-429-3121
Poynette	Village	MAINTENANCE	Columbia	2006	Sue Finstad	608-635-2122
Randolph	Town	MAINTENANCE	Columbia	2006	Rod Kok	920-348-5597
Courtland	Town	MARKET REVALUATION	Columbia	2007	Kate Raley	920-992-6585
Dekorra	Town	FULL REVALUATION	Columbia	2009	Vicki Auck	608-635-2014
Portage	City	FULL VALUE MAINTENANCE	Columbia	2001	Marie Moe	608-742-2176
Prairie du Chien	City	MAINTENANCE	Crawford	2012	Barb Elvert	608-326-6406
Berry	Town	MAINTENANCE	Dane	2003	Brenda Kahl	608-767-4152
Blooming Grove	Town	MAINTENANCE	Dane	2003	Mike Wolf	608-223-1104
Blue Mounds	Village	MAINTENANCE	Dane	2009	Mary Jo Michek	608-437-5197
Blue Mounds	Town	MAINTENANCE	Dane	2011	Helen Kahl	608-437-8722
Burke	Town	MAINTENANCE	Dane	2013	Brenda Ayers	608-825-8420
Cross Plains	Town	MAINTENANCE	Dane	2008	Ann Herger	608-798-0189
Deerfield	Town	MAINTENANCE	Dane	2007	Kim Grob	608-764-2608
Medina	Town	MAINTENANCE	Dane	2005	Jean Johnson	920-478-2615
Mount Horeb	Village	MAINTENANCE	Dane	2007	Cheryl Sutter	608-437-6884
Perry	Town	MAINTENANCE	Dane	2006	Mary Price	608-832-6877
Primrose	Town	MAINTENANCE	Dane	2012	Jamie Baker	847-567-8400
Shorewood Hills	Village	MAINTENANCE	Dane	2008	Cokie Albrecht	608-267-2680
Albion	Town	MARKET REVALUATION	Dane	2009	Julie Hanewall	608-884-8974
Madison	Town	FULL VALUE MAINTENANCE	Dane	2008	Renee Schwass	608-210-7260
McFarland	Village	FULL VALUE MAINTENANCE	Dane	2009	Tracey Berman	608-838-3153
Monona	City	FULL VALUE MAINTENANCE	Dane	2005	Joan Andrusz	608-222-2525
Oregon	Village	FULL VALUE MAINTENANCE	Dane	2004	Peggy Haag	608-835-3118
Pleasant Springs	Town	FULL VALUE MAINTENANCE	Dane	2002	Cassandra Clerkin	608-873-3063
Stoughton	City	FULL VALUE MAINTENANCE	Dane	2002	Maria Hougan	608-873-6692
Cambridge	Village	MAINTENANCE	Dane/Jefferson	2001	Lisa Moen	608-423-3712
Edgerton	City	FULL VALUE MAINTENANCE	Dane/Rock	2007	Cindy Hegglund	608-884-3341
Fox Lake	Town	MAINTENANCE	Dodge	2006	Mason Zantow	920-928-3573
Iron Ridge	Village	MAINTENANCE	Dodge	2010	Arlette Lindert	920-387-3975
Beaver Dam	City	FULL VALUE MAINTENANCE	Dodge	2001	John Somers	920-887-4600
Eldorado	Town	MAINTENANCE	Fond Du Lac	2010	Lori Linger	920-872-5071
Lancaster	City	MAINTENANCE	Grant	2009	Dave Kurihara	608-723-4246
Platteville	City	MAINTENANCE	Grant	2012	Jan Martin	608-348-1821
Brodhead	City	MAINTENANCE	Green/Rock	2009	Roseann Meixelsperger	608-897-4018
Sullivan	Village	MAINTENANCE	Jefferson	2002	Dale Horton	262-593-2388
Jefferson	City	FULL VALUE MAINTENANCE	Jefferson	2006	Tanya Stewart	920-674-7700
Whitewater	City	FULL VALUE MAINTENANCE	Jefferson/Walworth	2008	Michele Smith	262-473-0500
Silver Lake	Village	MAINTENANCE	Kenosha	2012	Terry Faber	262 -889-4308
Twin Lakes	Village	MAINTENANCE	Kenosha	2014	Jennifer Pollitt	262-877-2858
Upham	Town	MARKET REVALUATION	Langlade	2002	Leah Antoniewicz	715-275-4229
Cleveland	Village	MAINTENANCE	Manitowoc	2006	Stacy Grunwald	920-693-8181
Kronenwetter	Village	MAINTENANCE	Marathon	2012	Cindy Falkowski	715- 693-4200
Marathon	Town	MAINTENANCE	Marathon	2001	Janet Schneider	715- 443-6913
Menominee	Town	MAINTENANCE	Menominee	2009	Ruth Waupoose	715-799-3311
Glendale	City	MAINTENANCE	Milwaukee	2009	John Fuchs	414-257-1800
Shorewood	Village	FULL VALUE MAINTENANCE	Milwaukee	2014	Chris Swartz	414-847-2701
Cudahy	City	FULL VALUE MAINTENANCE	Milwaukee	2015	Dennis Broderick	414-769-2204
Bayside	Village	FULL VALUE MAINTENANCE	Milwaukee/Ozaukee	2006	Lynn Galyardt	414-351-8812
Pine Lake	Town	MAINTENANCE	Oneida	2006	Cindy Skinner	715-362-6071
Belgium	Village	MAINTENANCE	Ozaukee	2009	Katie Olsen	262-285-7931
Saukville	Village	MARKET REVALUATION	Ozaukee	2006	Dawn Wagner	262-284-9423
Prescott	City	MAINTENANCE	Pierce	2009	Jayne Brand	715-262-5544
Burlington	City	FULL VALUE MAINTENANCE	Racine / Walworth	2012	Diahnn Halbach	262-342-1171
Beloit	Town	MAINTENANCE	Rock	2004	Karry Devault	608-364-2980

ACCURATE APPRAISAL, LLC CURRENT CLIENTS

MUNICIPALITY	TYPE	JOB TYPE	COUNTY	ACQUIRED	CONTACT	PHONE #
Rock	Town	MAINTENANCE	Rock	2009	Deb Bennett	608-362-0598
Union	Town	MAINTENANCE	Rock	2005	Regina Ylvisaker	608-882-0285
Fulton	Town	MARKET REVALUATION	Rock	2006	Connie Zimmerman	608-868-4103
Milton	City	FULL VALUE MAINTENANCE	Rock	2004	Michelle A Ebbert	608-868-6900
West Baraboo	Village	MAINTENANCE	Sauk	2015	Kathy Goerks	608-356-2516
Angelica	Town	MAINTENANCE	Shawano	2008	Janet Powers	920-822-5554
Green Valley	Town	MAINTENANCE	Shawano	2006	Janalee Jenerou	715-745-2699
Wescott	Town	MAINTENANCE	Shawano	2009	Angela Vreeke	715-526-9755
Sheboygan Falls	Town	MAINTENANCE	Sheboygan	2009	Jenny Meyer	920-467-1922
Darien	Town	MAINTENANCE	Walworth	2009	Marilyn Larson	262-882-3393
Delavan	Town	MAINTENANCE	Walworth	2012	John Olson	262-728-3471
Geneva	Town	MAINTENANCE	Walworth	2009	Debra Kirch	262-248-8497
Richmond	Town	MAINTENANCE	Walworth	2006	Barb Ceas	608-883-2017
Spring Prairie	Town	MAINTENANCE	Walworth	2009	Debbie Collins	262-642-7477
Sugar Creek	Town	MAINTENANCE	Walworth	2002	Diane Boyd	262-742-3383
Walworth	Village	MAINTENANCE	Walworth	2007	Donna Schut	262-275-2127
Fontana	Village	MARKET REVALUATION	Walworth	2005	Dennis Martin	262-275-6136
Elkhorn	City	FULL VALUE MAINTENANCE	Walworth	2001	Sam Tapson	262-723-2219
Lake Geneva	City	FULL VALUE MAINTENANCE	Walworth	2005	Mike Hawes	262-249-4092
Farmington	Town	MAINTENANCE	Washington	2012	Chris Schellinger	262-447-1018
Hartford	City	FULL REVALUATION	Washington	2011	Lori Hetzel	262-673-8201
Germantown	Village	MARKET REVALUATION	Washington	2009	Dave Schornack	262-250-4750
Hartland	Village	MARKET REVALUATION	Waukesha	2007	Connie Casper	262-367-2714
Sussex	Village	FULL VALUE MAINTENANCE	Waukesha	2008	Sue Freiheit	262-246-5211
Rose	Town	MAINTENANCE	Waushara	2005	Lois Kolka	920-622-3765

References

Lori Gosz, City Administrator
City of Brillion
130 Calumet Street
Brillion, WI 54110
920-756-2250

Marie Moe, City Clerk
City of Portage
115 W Pleasant St.
Portage, WI 53901
608-742-2176

Dave Hongisto, Building Inspector
City of DePere
335 S. Broadway St.
DePere, WI 54115
920-339-4053

Helen Schmidlkofer, City Clerk
City of Chilton
42 School St.
Chilton, WI 53014
920-849-2451

John Somers, Finance Director
City of Beaver Dam
205 S Lincoln Ave.
Beaver Dam, WI 53916
920-887-4600

Basic Information Requirements

a) Name of firm: Accurate Appraisal LLC
b) Name and title: Lee De Groot, Owner
c) Mailing Address: PO Box 415 Menasha, WI 54952-0415 E-Mail Address: leed@accurateassessor.com
d) Telephone and Fax numbers: P 920-749-8098 F 920-749-8099
e) I, Lee De Groot, have the authority to commit my firm to the terms proposed.

Business Philosophy

In an effort to deliver a high level of service to our clients, Accurate has created an operational philosophy that ensures that clients are the focus of everything we do. Customer service is the main priority of Accurate. Our goal is to inform and educate the taxpayers, so that all constituents feel like they have been treated fairly and equitably. We will do everything we can to execute this plan.

Basic Qualifications and Experience

a) We are a statewide assessing firm that is the statutory assessor for 98 municipalities (list and contact information attached). We started our business in the fall of 2000 and now we have 22 full-time employees at Accurate Appraisal LLC - 10 of which are State certified Level 2, 6 are Level 1 and 4 have the Technician certification. We will have specific contacts for your account to allow for seamless transition (resumes attached).

b) The primary management contact person is Lee De Groot, supported by a level 2 project manager, as well as a level 2 personal property coordinator.

c) Resumes for Lee De Groot, and Jim Danielson, owners are enclosed.

Our Proposed Rates

a) Our rate is an all inclusive annual flat rate

Accurate Appraisal, LLC. Team

1. **Lee De Groot**-Member-State Certified Level 2 Assessor
2. **Jim Danielson**-Member-State Certified Level 2 Assessor
3. **Wayne Koehler**-Project Manager-State Certified Level 2 Assessor
4. **Paul Mauel**-Field Manager-State Certified Level 2 Assessor
5. **Lonnie Belcher**-Field Manager-State Certified Level 2 Assessor
6. **Paul Kiefer**-Field Team-State Certified Level 2 Assessor
7. **Gary Doering**-Field Team-State Certified Level 1 Assessor
8. **Jeff De Groot** – Field Team-State Certified Assessment Technician
9. **Brad Cupp** – Senior Appraiser-State Certified Level 2 Assessor
10. **Barb Wroblewski** – Senior Appraiser- State Certified Level 2 Assessor
11. **Kyle Hayes** – Office Team – State Certified Level 1 Assessor
12. **Ryan Wilson** – Project Manager/Office Team – State Certified Level 2 Assessor
13. **Addie Ebert** – Personal Property Director – State Certified Level 2 Assessor

14. **Bill Gaber** – Logistic Coordinator – State Certified Level 1 Assessor
15. **Sherry Crain**-Office Team-State Certified Level 1 Assessor
16. **Deb Dedman**-Office Team-State Certified Level 1 Assessor
17. **Traci Hauser**-Data Entry Team-State Certified Assessment Technician
18. **Jamie Busha**-Personal Property Specialist-State Certified Level 1 Assessor
19. **Terri Muskevitsch**-Office Team – State Certified Assessment Technician
20. **Rick Peters**-Office Coordinator – State Certified Assessment Technician
21. **Brooklyn Petit** – Office Team
22. **Patti Peters** – Office Team

Lee T. De Groot

Employment

Accurate Appraisal LLC., Appleton, WI.

Member (June 2000 – Present)

- Current projects: City of Beaver Dam, City of Portage, City of Lake Geneva, City of Stoughton, City of Glendale, City of Brodhead, City of Brillion, City of Chilton, City of Jefferson, City of Elkhorn, City of Monona, City of Edgerton, City of Milton, City of Lodi, City of De Pere, City of Lancaster, City of Prescott, Village of Saukville, Village of Fontana, Village of Bayside, Village of Hartland, Village of Sussex, Village of Germantown, Village of Kimberly, Village of Belgium, Village of Mount Horeb, Village of Cambridge, Village of Sullivan, Village of Pardeeville, Village of Cambria, Village of Oregon, Village of Blue Mounds, Village of Cleveland, Village of Combined Locks, Village of Friesland, Village of Poynette, Village of Walworth, Village of Shorewood Hills.
- Company is Statutory Assessor for 99 municipalities statewide.
- Relegating and managing an assessor crew.
- Residential and commercial valuing.
- Open Book and Board of Review Sessions.
- Developed software program.
- Experienced in GVS, Microsolve, and PC Market Drive software.
- Assessor since 1993.

Education

University of Wisconsin – Oshkosh, Bachelor of Science (May 1991)

Major: Political Science, emphasis in Public Administration.

Minor: Business Administration.

Assessor Certification

State of Wisconsin Certified Level 2 Assessor # JQL722814D.

James Danielson

Employment

Accurate Appraisal LLC., Appleton, WI.

Member (June 2000 – Present)

- Largest Current Projects: City of Beaver Dam, City of Portage, City of Lake Geneva, City of Stoughton, City of Glendale, City of Brodhead, City of Brillion, City of Chilton, City of Jefferson, City of Elkhorn, City of Monona, City of Edgerton, City of Milton, City of Lodi, City of De Pere, City of Lancaster, City of Prescott, Village of Saukville, Village of Fontana, Village of Bayside, Village of Hartland, Village of Sussex, Village of Germantown, Village of Kimberly, Village of Belgium, Village of Mount Horeb, Village of Cambridge, Village of Sullivan, Village of Pardeeville, Village of Cambria, Village of Oregon, Village of Blue Mounds, Village of Cleveland, Village of Combined Locks, Village of Friesland, Village of Poynette, Village of Walworth, Village of Shorewood Hills.
- Company is Statutory Assessor for 99 municipalities statewide.
- Relegating and managing an assessor crew.
- Residential and commercial valuing.
- Open Book and Board of Review Sessions.
- Developed software program.
- Experienced in GVS, Microsolve, and PC Market Drive software.

Education

University of Wisconsin – Stevens Point, Bachelor of Science

Major:Business Administration.

Minor:Economics

Assessor Certification

State of Wisconsin Certified Level 2 Assessor # JQG020214D