



Agreement for Assessment Services

Prepared for:

City of Waterloo

By

Accurate Appraisal, LLC.

AGREEMENT FOR ASSESSMENT SERVICES

Section I

This agreement made this _____ day of _____, 2012 by and between the City of Waterloo, Jefferson County, 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 2013-2015 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.
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 years beginning November 16th, 2012 (or as mutually agreed) and ending December 31st, 2015. 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, Global Valuation Systems or Market Drive, 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 either 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. Initial postcards will be mailed to all property owners explaining each year's assessment process.
18. We are required to be USPAP compliant as of January 1st, 2013.
19. Upon completion of the Board of Review 2013, the WPAM requires that all assessment data to be in an electronic format.

20. Jim Danielson and Lee De Groot are the primary team members that handle your account. Their resumes are at the back of the proposal. We also have 4 Field employees with a combined 30 years of experience in the Assessing field. Our office staff consists of 12 employees that support Jim and Lee. They have over 60 years of experience in the Assessing business. Altogether we have 7 employees that are certified as Assessor 2's and 3 employees that are certified as Assessor 1's. All other employees have the Technician certification.

Section II

Parcel Totals:

Residential Total = 1,095

Residential Improved = 954

Commercial Total = 207

Commercial Improved = 118

Agricultural = 50

Undeveloped = 21

Other Total = 16

Other Improved = 16

Section III

Agreement for Maintenance

Provided by Accurate Appraisal LLC.

For

City of Waterloo, Jefferson County for the assessment years 2013-2015

Dated this _____ day of _____ 2012.

Agreement completion date of June 30th each year

Fee for services rendered:

Accurate shall be paid the sum of:

SEE PRICING OPTIONS NEXT PAGE

Jim Danielson
Member
Accurate Appraisal LLC

Date

Authorized Client Signature

Date

Type of Assessing Service and Price **CITY OF WATERLOO**

1. Regular Maintenance 2013-2015 **\$8,500 per year**

Alternative 1: **\$13,900 per year**

1. Regular Maintenance with Market Revaluations performed in years 2 & 5

Alternative 2: **\$20,000 per year**

1. Regular Maintenance with Full 100% physical inspection revaluation in year 2 and a market revaluation in year 5

Alternative 3: **\$23,500 per year**

1. Full Value Assessment program with 16.67% annual physical inspection cycle while maintaining full market value assessments

*****ADDITIONAL RFP QUESTIONS*****

1. There is no pending litigation against our company.
2. There are no investigations by any regulatory agency
3. All data will be converted to digital format by the Board of Review 2013 and all pictures and sketches will be done by the next revaluation.

References

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

Racquel Giese, Assistant
Village of Combined Locks
405 Wallace St.
Combined Locks, WI 54113
920-788-7740

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

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

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

Bruce Jamroz, City Clerk
City of Mosinee
225 Main Street
Mosinee, WI 54455
715-693-2275

Rick Hermes, Administrator
Village of Kimberly
515 W Kimberly Ave
Kimberly, WI 54136
920-788-7500

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

Michelle Ebert, City Clerk
City of Milton
430 E High St.
Milton, WI 53563
608-868-6900

Luann Alme, City Clerk
City of Stoughton
381 E. Main St.
Stoughton, WI 53589
608-873-6677

CURRENT JEFFERSON COUNTY JOBS

1. City of Jefferson
2. City of Whitewater
3. Village of Cambridge
4. Village of Sullivan
5. Town of Watertown

ACCURATE APPRAISAL, LLC CURRENT CLIENTS

MUNICIPALITY	TYPE	JOB TYPE	COUNTY	ACQUIRED	CONTACT	PHONE #
De Pere	City	MAINTENANCE	Brown	2005	Dave Hongisto	920-339-4053
Brillion	City	MAINTENANCE	Calumet	2002	Lori Gosz	920-756-2250
Chilton	City	MAINTENANCE	Calumet	2002	Helen Schmidtkofer	920-849-2451
Harrison	Town	MAINTENANCE	Calumet	2007	Penny Weir	920-989-1062
Caledonia	Town	MAINTENANCE	Columbia	2009	Angeline Edgar	608-742-4801
Cambria	Village	MAINTENANCE	Columbia	2002	Lois Frank	920-348-5443
Courtland	Town	MAINTENANCE	Columbia	2007	Kate Raley	920-992-6585
Dekorra	Town	REVALUATION	Columbia	2009	Vicki Auck	608-635-2014
Friesland	Village	MAINTENANCE	Columbia	2006	Marcia Dykstra	920-348-5156
Lodi	City	REVALUATION	Columbia	2005	Adele Van Ness	608-592-3247
Lodi	Town	REVALUATION	Columbia	2009	April Goeske	608-592-4868
Pardeeville	Village	MAINTENANCE	Columbia	2002	Marlo Gustafson	608-429-3121
Portage	City	FULL VALUE MAINTENANCE	Columbia	2001	Marie Moe	608-742-2176
Poynette	Village	MAINTENANCE	Columbia	2006	Sue Finstad	608-635-2122
Randolph	Town	MAINTENANCE	Columbia	2006	Rod Kok	920-348-5597
Albion	Town	MAINTENANCE	Dane	2009	Julie Hanewall	608-884-8974
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	Nancy Parsley	608-437-5197
Blue Mounds	Town	MAINTENANCE	Dane	2011	Helen Kahl	608-437-8722
Cottage Grove	Town	MAINTENANCE	Dane	2009	Kim Banigan	608-839-5021
Cross Plains	Town	REVALUATION	Dane	2008	Ann Herger	608-798-0189
Deerfield	Town	REVALUATION	Dane	2007	Betty Duckert	608-764-8054
Madison	Town	MAINTENANCE	Dane	2008	Renee Schwass	608-210-7260
McFarland	Village	MAINTENANCE	Dane	2009	Deb Neal	608-838-3153
Medina	Town	MAINTENANCE	Dane	2005	Jean Johnson	920-478-2615
Monona	City	FULL VALUE MAINTENANCE	Dane	2005	Joan Andrusz	608-222-2525
Mount Horeb	Village	MAINTENANCE	Dane	2007	Cheryl Sutter	608-437-6884
Oregon	Village	FULL VALUE MAINTENANCE	Dane	2004	Tracey Berman	608-835-6289
	Town	MAINTENANCE	Dane	2006	Mary Price	608-832-6877
Pleasant Springs	Town	FULL VALUE MAINTENANCE	Dane	2002	Cassandra Clerkin	608-873-3063
Shorewood Hills	Village	MAINTENANCE	Dane	2008	Cokie Albrecht	608-267-2680
Stoughton	City	FULL VALUE MAINTENANCE	Dane	2002	Nick Probst	608-873-6692
Cambridge	Village	REVALUATION	Dane/Jefferson	2001	Lisa Moen	608-423-3712
Edgerton	City	FULL VALUE MAINTENANCE	Dane/Rock	2007	Ramona Flanagan	608-884-3341
Beaver Dam	City	FULL VALUE MAINTENANCE	Dodge	2001	John Somers	920-887-4600
Fox Lake	Town	MAINTENANCE	Dodge	2006	Edwin Benter	920-928-3573
Iron Ridge	Village	MAINTENANCE	Dodge	2010	Arlette Lindert	920-387-3975
Hartford	City	MAINTENANCE	Dodge/Washington	2011	Lori Hetzel	262-673-8201
Washington	Town	MAINTENANCE	Door	2002	Valerie Carpenter	920-847-2522
Eldorado	Town	MAINTENANCE	Fond Du Lac	2010	Lori Linger	920-872-5071
Lancaster	City	MAINTENANCE	Grant	2009	Dave Kurihara	608-723-4246
Brodhead	City	REVALUATION	Green/Rock	2009	Roseann Meixelsperger	608-897-4018
Jefferson	City	FULL VALUE MAINTENANCE	Jefferson	2006	Tanya Stewart	920-674-7700
Sullivan	Village	MAINTENANCE	Jefferson	2002	Dale Horton	262-593-2388
Watertown	Town	MAINTENANCE	Jefferson	2004	Jim Wendt	920-262-9384
Whitewater	City	FULL VALUE MAINTENANCE	Jefferson/Walworth	2008	Michelle Smith	262-473-0500
Silver Lake	Village	MAINTENANCE	Kenosha	2012	Terry Faber	262-889-4308
Upham	Town	MAINTENANCE	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
Mosinee	City	REVALUATION	Marathon	2004	Bruce Jamroz	715-693-2275
Menominee	Town	MAINTENANCE	Menominee	2009	Ruth Waupoose	715-799-3311
Brown Deer	Village	MAINTENANCE	Milwaukee	2007	Russ Van Gompel	414-371-3050
Glendale	City	REVALUATION	Milwaukee	2009	John Fuchs	414-257-1800
Bayside	Village	FULL VALUE MAINTENANCE	Milwaukee/Ozaukee	2006	Lynn Galyardt	414-351-8812
Pine Lake	Town	REVALUATION	Oneida	2006	Cindy Skinner	715-362-6071
Bovina	Town	REVALUATION	Outagamie	2011	Chuck Pluger	920-986-3224
Buchanan	Town	MAINTENANCE	Outagamie	2009	Angela Gorell	920-734-8599
Combined Locks	Village	MAINTENANCE	Outagamie	2006	Racquel Giese	920-788-7740
Dale	Town	MAINTENANCE	Outagamie	2007	Jennifer DeVeeuw	920-779-4609
Kimberly	Village	MAINTENANCE	Outagamie	2008	Rick Hermes	920-788-7500
Seymour	City	MAINTENANCE	Outagamie	2006	Susan Garsov	920-833-2209
New London	City	MAINTENANCE	Outagamie/Waupaca	2010	Sue Tennie	920-982-8500
Belgium	Village	MAINTENANCE	Ozaukee	2009	Katie Olsen	262-285-7931
Saukville	Village	REVALUATION	Ozaukee	2006	Dawn Wagner	262-284-9423
Prescott	City	MAINTENANCE	Pierce	2009	Jayne Brand	715-262-5544
Burlington	City	MAINTENANCE	Racine / Walworth	2012	Beverly Gill	262-342-1171
Beloit	Town	MAINTENANCE	Rock	2004	Karry Devault	608-364-2980
Fulton	Town	REVALUATION	Rock	2006	Connie Zimmerman	608-868-4103
Milton	City	FULL VALUE MAINTENANCE	Rock	2004	Michelle A Ebbert	608-868-6900
Rock	Town	REVALUATION	Rock	2009	Deb Bennett	608-362-0598
Union	Town	REVALUATION	Rock	2005	Regina Yivisaker	608-882-0285

ACCURATE APPRAISAL, LLC CURRENT CLIENTS

MUNICIPALITY	TYPE	JOB TYPE	COUNTY	ACQUIRED	CONTACT	PHONE #
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
Hudson	City	REVALUATION	St. Croix	2011	Denny Darnold	715-386-4776
Darien	Town	MAINTENANCE	Walworth	2009	Marilyn Larson	262-882-3393
Delavan	Town	MAINTENANCE	Walworth	2012	John Olson	262-728-3471
Elkhorn	City	FULL VALUE MAINTENANCE	Walworth	2001	Sam Tapson	262-723-2219
Fontana	Village	REVALUATION	Walworth	2005	Dennis Martin	262-275-6136
Geneva	Town	MAINTENANCE	Walworth	2009	Debra Kirch	262-248-8497
Lake Geneva	City	REVALUATION	Walworth	2005	Mike Hawes	262-249-4092
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	REVALUATION	Walworth	2007	Donna Schut	262-275-2127
Germantown	Village	MAINTENANCE	Washington	2009	Dave Schornack	262-250-4750
Hartland	Village	MAINTENANCE	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

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

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 Mosinee, City of Milton, City of Lodi, City of De Pere, City of Lancaster, City of Prescott, Village of Saukville, Village of Fontana, Village of Brown Deer, 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 93 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

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 Mosinee, City of Milton, City of Lodi, City of De Pere, City of Lancaster, City of Prescott, Village of Saukville, Village of Fontana, Village of Brown Deer, 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 93 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.