



6550 N. Federal Highway  
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Fort Lauderdale, FL 33308



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



954.771.0896

# PROJECT PROPOSAL

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## for Auditing Services

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Prepared for

**City of Hollywood**

2600 Hollywood Blvd, Room 221  
Hollywood, FL 33020

P: 954.921.3223 E: [rdierks@hollywoodfl.org](mailto:rdierks@hollywoodfl.org)

Issued date

08.19.2016

# PROPOSAL FOR FINANCIAL AUDITING SERVICES

Issued on August 19, 2016

Keefe McCullough  
6550 N Federal Highway, 4<sup>th</sup> Floor  
Fort Lauderdale, FL 33308

Phone: 954-771-0896

Contact: Bill Benson  
Email: [Bill.Benson@kmc CPA.com](mailto:Bill.Benson@kmc CPA.com)



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# TRANSMITTAL LETTER

## Section I





August 19, 2016

Mr. Ralph Dierks, Procurement Manager  
And Members of the Audit Selection Committee  
City of Hollywood  
2600 Hollywood Blvd, Room 221  
Hollywood, FL 33020

Dear Mr. Dierks and Members of the Audit Selection Committee:

We are pleased to propose to perform auditing services for the City of Hollywood. It is our understanding that our proposal covers the annual financial and compliance audit of the various funds of the City for the fiscal years ending September 30, 2016, 2017 and 2018 with the continuation option of auditing its financial statements for two additional two-year periods.

Our examination of these financial statements will be conducted in accordance with:

- a. Generally Accepted Auditing Standards promulgated by and through the American Institute of Certified Public Accountants;
- b. Government Auditing Standards, as issued by the Comptroller General of the United States;
- c. The provisions of U.S. Office of Management and Budget (OMB) Super Circular;
- d. Rules of the Auditor General for the State of Florida Chapter 10.550 relating to Section 11.45 of the Florida Statutes;
- e. Section 215.97 Florida Statutes, Florida Single Audit Act;
- f. Section 163.387 Florida Statutes, Redevelopment Trust Fund; and
- g. Any other applicable Federal, State and local laws or regulations.

We are familiar with and prepared to advise City staff on how best to implement both current and proposed GASB statements. We are also prepared to provide informal advice and consultation throughout the year on matters relating to accounting and financial reporting. We understand there would not necessarily include any task that entails significant research or a formal report.

Keefe McCullough is committed to performing the auditing services within the prescribed time frame as outlined in the City's request for proposal.

The following individuals are authorized to make representations for our firm:

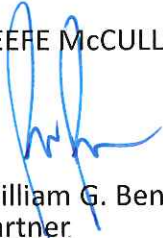
William G. Benson, C.P.A., Partner  
Israel J. Gomez, C.P.A., Partner  
6550 N Federal Highway, 4<sup>th</sup> Floor  
Ft. Lauderdale, FL 33308  
954-771-0896

We believe our firm to be the best qualified to perform your audit engagements based on our substantial governmental experience obtained over the entire period of our firm's existence, our firm's commitment to continue to provide the necessary continuing professional education to qualify all of our professional governmental accounting staff in this specialized area, our absolute dedication to excellence and quality in our practice and our unique service philosophy which has resulted in a loyal and satisfied clientele over many years.

We hereby attest to our authority to submit this proposal and to individually bind Keefe McCullough to perform this audit in accordance with the resulting contract agreement should the firm be selected. This proposal is a firm and irrevocable offer for one hundred and eighty (180) days from the date of the proposal.

Regards,

KEEFE McCULLOUGH



William G. Benson, C.P.A.  
Partner



Successful auditors  
share the City's  
commitment to  
excellence



# TECHNICAL PROPOSAL

## Section II







## INDEPENDENCE

**A) The firm shall provide an affirmative statement that it is independent of the City of Hollywood as defined by generally accepted auditing standards and the U.S. General Accounting Office's Governing Audit Standards.**

Keefe McCullough is independent of the City of Hollywood as defined by generally accepted auditing standards and the U.S. General Accounting Office's Governing Audit Standards.

**B) The firm should list and describe the firm's professional relationships, if any, involving the City of Hollywood for the past five (5) years.**

Our firm has had no professional relationships involving the City of Hollywood within the past five (5) years.

## LICENSED TO PRACTICE IN FLORIDA

**An affirmative statement must be included indicating that the firm and all assigned key professional staff are properly registered/licensed to practice in accordance with Florida regulations.**

Keefe McCullough is properly licensed in the State of Florida by the Department of Professional Regulation. Our license number is AD 0010282. Further all members of the firm that are designated as Certified Public Accountants are properly licensed in the State of Florida.

## FIRM QUALIFICATIONS AND EXPERIENCE

**A) The proposal should state whether the firm is national, regional or local. Describe the overall firm, including its size, range of activities, the size of the firm's governmental audit staff and the location of the offices from which the staff assigned to this engagement will be based.**

Keefe McCullough is a local firm located at 6550 N Federal Hwy, 4<sup>th</sup> Floor, Ft. Lauderdale, FL 33308. Our office consists of seven partners, approximately sixty-five (65) professional accounting staff members and administrative support personnel. Our governmental audit staff consists of thirty-five professionals. Our practice includes audit and review engagements, tax planning and tax return preparation, small business accounting, investment advisory services and consulting services.

**B) The firm shall also provide information on the results of any federal or state desk reviews or field reviews of its audits during the past three (3) years. In addition, the firm shall provide information on the circumstances and status of any disciplinary action taken or pending against the firm or any of the professional staff during the past three (3) years with state regulatory bodies or professional organizations.**

Because our firm performs a substantial number of "Yellow Book" type engagements, we routinely receive desk reviews from various State of Florida departments (DCF, FDOT or DOEA). We have had no field reviews during the last three years, and we are not aware of any disciplinary action ever taken or now pending against our firm or any of our professional accounting staff. We are not aware of any pending local office litigation or litigation related to our firm's audits of State or Local Government entities.





Neither our firm, nor any of our employees present or past, or anyone acting on our behalf, has ever been convicted of any crime or offense arising directly or indirectly from the conduct of our firm's business, nor have any of our firm's officers, director or persons exercising substantial policy discretion ever been convicted of any crime or offense involving business or financial misconduct or fraud for the entire forty-five (45) year history of our firm.

**C) The firm shall also describe any litigation or proceeding whereby, during the past two years, a court or any administrative agency has ruled against the firm in any manner related to its professional activities. Similar information shall be provided for any current or pending litigation. Failure to return this information with your proposal will result in the rejection of your proposal.**

We have had no actions, suits, proceedings, disciplinary actions or investigations, pending or threatened against our firm or any member of our firm for the entire forty-five (45) year history of our firm.

**D) The firm shall submit a copy of its most recent external quality control review report.**

Our firm participates in the American Institute of Certified Public Accountants Peer Review Program and we have received unmodified opinions on all of our previous peer reviews. We have provided the most recent quality control review documentation for your reference in section VI. This quality control review included a specific review of the Town of Davie and the City of Sunny Isles Beach, Florida audit workpapers, financial statements and reports.

**PARTNER, SUPERVISORY AND STAFF QUALIFICATIONS AND EXPERIENCE**

**A) Identify the audit partner, manager and each individual who will work as part of the audit engagement. Include resumes for each person to be assigned. The resumes may be included as an appendix. The resumes must include documentation that the individual assigned to the audit meet the professional education requirements necessary to perform governmental audits, including adequate continuing public education within the preceding two (2) years.**

Our proposed audit team is comprised of the following principal supervisory and management staff:

Israel J. Gomez, C.P.A.	Engagement Partner
William G. Benson, C.P.A.	Second Review Partner
Marc A. Grace, C.P.A.	Manager

A profile of each audit team member is included in section V, which lists specific governmental experience, qualifications, continuing professional education and memberships in professional organizations relevant to the performance of the audit.

**B) Describe the experience in conducting similar audits for each of the individuals assigned to the engagement. Also describe the firm's management support personnel available for technical consultation.**

The profiles of each audit team member in section V detail their governmental auditing experience. In addition, our firm philosophy emphasizes direct partner involvement in each engagement including various phases of the audit fieldwork and review processes. This ensures that the engagement partner is always available for technical consultation or to address any client questions.



**C) Describe the organization of the proposed audit team, detailing the level of involvement, field of expertise and estimated hours for each member of the team.**

Below are the number of hours we anticipate spending on an annual basis for this contract broken down by job position. Each member of the team is specialized in governmental auditing.

Partners	100 hours
Manager	200 hours
Supervisors	250 hours
Senior Accountant	430 hours
Staff 1	425 hours
Staff 2	425 hours
Staff 3	425 hours

**D) Engagement partners, managers, other supervisory staff and specialists may be changed with the express prior written permission of the City of Hollywood if those personnel leave the firm, are promoted or are assigned to another office. Those personnel may also be changed for other reasons. In either case, the City of Hollywood retains the right to approve or reject replacements.**

We understand that the engagement partners, managers, other supervisory staff and specialists mentioned in this request for proposal may be changed with the express prior written permission of the City. We also understand the City retains the right to approve or reject replacements.

**SIMILAR ENGAGEMENTS WITH OTHER GOVERNMENT ENTITIES**

**For the engagement office assigned responsibility for the audit, list and rank the five (5) most significant engagements performed in the last five (5) years that are similar to the engagement described in this Request for Proposal. These engagements should be ranked on the basis of total staff hours**

**Indicate the scope of work, date, engagement partners, total hours, and the name and telephone number of the principal client contact. The City reserves the right to contact the above-mentioned references and any other clients.**

Mr. Mark Z. Finigan, Finance Director  
**City of Key West**

Phone: 305-809-3821

Scope of services:

- Annual financial and compliance audits of the City
- Assistance in helping the City obtain the Certificate of Achievement for Excellence in Financial Reporting issued by the Government Finance Officers Association
- Assistance in helping the City comply with the requirements of Governmental Accounting Standards Board Statements and related pronouncements

Date of project: 2008 through present

Hours: 1,000

Engagement Partners: William G. Benson, C.P.A.





Ms. Mary Fowler, Controller

**City of Plantation, Florida**

Phone: 954-797-2202

Scope of services:

- Annual financial and compliance audits of the City and its blended component units
- Assistance in helping the City obtain the Certificate of Achievement for Excellence in Financial Reporting issued by the Government Finance Officers Association
- Assistance in helping the City comply with the requirements of Governmental Accounting Standards Board Statements and related pronouncements

Date of project: 1994 through present

Hours: 900

Engagement Partners: William G. Benson, C.P.A.

Ms. Corinne V. Elliott, Controller

**City of Lake Worth, Florida**

Phone: 561-586-1654

Scope of services:

- Annual financial and compliance audits of the City
- Assistance in helping the City obtain the Certificate of Achievement for Excellence in Financial Reporting issued by the Government Finance Officers Association
- Assistance in helping the City comply with the requirements of Governmental Accounting Standards Board Statements and related pronouncements

Date of project: 2014 through present

Hours: 850

Engagement Partners: Israel J. Gomez, C.P.A.

Mr. William W. Ackerman, Budget and Finance Director

**Town of Davie**

Phone: 954-797-1050

Scope of services:

- Annual financial and compliance audits of the Town
- Assistance in helping the Town obtain the Certificate of Achievement for Excellence in Financial Reporting issued by the Government Finance Officers Association

Date of project: 2013 through present

Hours: 800

Engagement partners: Israel J. Gomez, C.P.A.

Mr. Gary S. Clinton, CPA, CPFO, Finance Director

**Village of Pinecrest**

Phone: 305-234-2121

Scope of services:

- Annual financial and compliance audits of the Village
- Assistance in helping the Village obtain the Certificate of Achievement for Excellence in Financial Reporting issued by the Government Finance Officers Association
- Assistance in helping the City comply with the requirements of Governmental Accounting Standards Board Statements and related pronouncements

Date of project: 2008 through present

Hours: 450

Engagement Partners: Cynthia L. Calvert, C.P.A.

In addition to performing over eighteen (18) South Florida municipalities, our firm presently audits over sixty (60) school audits and over one hundred (100) South Florida not-for-profit organizations.



## CONFLICT OF INTEREST

**The proposal must also disclose any potential conflicts of interest due to any other client's contract or property interests or include a notarized statement certifying that no member of your firm's ownership, management or staff currently have a vested interest which might be considered a conflict of interest. Any potential conflict of interest listed by a firm will be reviewed by the City Attorney to determine its substantiveness. If the conflict of interest is found to be substantive, the proposal will be rejected.**

Our firm does not have any conflicts of interest with the City due to any other client's contract or property interests and no member of our firm's ownership, management or staff currently have a vested interest which might be considered a conflict of interest.

## SPECIFIC AUDIT APPROACH

**The proposal must set forth a work plan, including an explanation of the audit methodology to be followed to perform the services required in Part A of this Request for Proposal.**

**In developing the work plan, reference should be made to such sources of information as the City of Hollywood's budget and related materials, organizational charts, manuals, programs, and other financial and management information. Proposers will be required to provide the following information on their audit approach:**

- A. Proposed segmentation of the engagement.**
- B. Staffing assignments and levels to be designated to each proposed segment of the engagement.**
- C. Extent of evaluation and use of electronic data processing software in the engagement.**
- D. Approach to be taken to gain and document an understanding of the City of Hollywood's internal control structure.**
- E. Approach to be taken in determining laws and regulations that will be subject to audit test work.**
- F. Approach to be taken in determining audit samples for purposes of test compliance.**
- G. Describe any municipal staff support anticipated for the audit.**

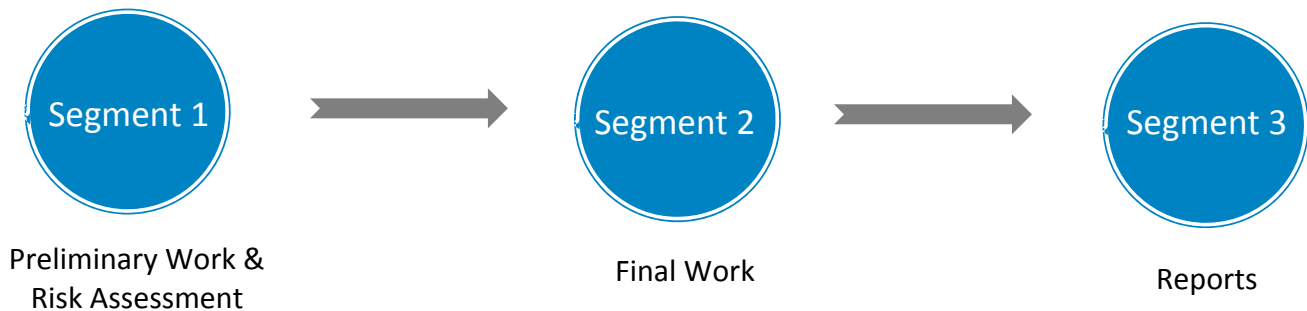
We have provided below a preliminary engagement work plan to perform the financial and compliance audits which involve the government-wide financial statements, the various funds, and the capital assets and long-term debt of the City.

In performing the financial and compliance audits for the City we will follow very detailed and comprehensive audit programs. Further, it is our policy to utilize the talents of our client's personnel wherever and whenever it is feasible to do so in the course of any engagement in order to most efficiently and economically perform the engagement.

The following pages show our summary of the audit work plan:



# SPECIFIC AUDIT APPROACH



## Segment 1

Preliminary Work &  
Risk Assessment

The first segment will be performed by three professional staff members and will encompass approximately 560 hours.

Obtain an understanding of the accounting and management systems including documentation of the system of internal control through conferences with the various key finance department personnel and standardized checklists.

Obtain information needed to identify risk assessment by making certain inquiries and considering fraud risk factors and other information.

Obtain an understanding of the various funds, capital assets and long-term debt utilized.

Review the grants, contracts and various revenue sources and complete "Single Audit" checklist for determination of compliance audit and reporting requirements for both Federal and State single audit purposes.

Review of bond indenture covenants and pertinent ordinances for determination and completion of compliance audit requirements.

Assess control risk and determine extent of testing.

Review and perform certain transaction and procedural tests which will include the examination of source documents. These tests of the system will include tests of cash receipts and disbursements, sales and utility billing, compliance, and payroll. Audit samples will be determined based on transaction size and number of total transactions.



## Segment 1

Preliminary Work &  
Risk Assessment

Perform preliminary analytical review procedures.

Review council and other pertinent minutes.

Perform compliance audit procedures where necessary.

Coordinate preparation of confirmation requests.

Working paper review.

Plan the additional segments of the financial audit procedures with the City's finance personnel including a list of schedules and working papers to be prepared by client personnel.

## Segment 2

Final Work

The second segment will be performed by three professional staff members and will encompass approximately 1,135 hours.

Perform various tests and validation procedures on selected asset, liability and equity accounts in all funds and for capital assets and long-term debt. Examine certain revenue and expenditure accounts in all funds.

Send confirmations where applicable.

Send correspondence to attorneys as necessary.

Perform final compliance testing as necessary.

Perform final analytical procedures.

Obtain a management representation letter.

Working paper review and proposed journal entry approval.

Exit conference with City Manager.

Sample sizes in the various phases of the engagement would be determined based on population sizes, audit objectives and nature of transaction and/or account. We have standardized checklists and audit software that assists in the selection of these samples. Additionally, we would utilize both "statistical" and "non-statistical" methods to select certain test transactions.



## Segment 2

Final Work

We will also utilize various forms of analytical procedures to accomplish certain audit objectives. We anticipate areas of concentration subject to analytical procedures to be services revenues and expenditures. We retain the right to use judgment as to the extent of analytical procedures to be used based mainly on the results of other testing completed.

In addition, we utilize personal computers and paperless audit software, where applicable, in connection with our audit workpaper preparation and documentation.

## Segment 3

Reports

The third segment will be performed by two professional staff members and will encompass approximately 560 hours.

Preparation of the Basic Financial Statements.

Preparation of Reports on Internal Controls and Compliance.

Preparation of Single Audit Report on Compliance and Internal Control over Compliance Applicable to Each Major Federal Program and State Project.

Preparation of Report to City Management which will include any material weaknesses and any irregularities and illegal acts.

Review of the financial statements, reports and other information.

Technical review of the financial statements, reports and other information.







## PROOF OF PROFESSIONAL LIABILITY INSURANCE

**Firms shall provide proof that they are in compliance with the insurance requirements regarding minimum coverage for Professional Liability Insurance.**

Our firm is in compliance with the insurance requirements regarding minimum coverage of Professional Liability Insurance as outlined in the City's RFP. We would be pleased to provide proof if our firm is selected as auditor.

## IDENTIFICATION OF ANTICIPATED POTENTIAL AUDIT PROBLEMS

**The proposal should identify and describe any anticipated potential audit problems, the firm's approach to resolving these problems and any special assistance that will be requested from the City of Hollywood.**

At this time we are not aware of any potential audit problem areas. If selected, we will communicate any potential problem areas we become aware of during the audit. At that time, we would outline our approach to resolving such problem areas and the level of assistance necessary from the City's personnel.

## ADDITIONAL INFORMATION

**A) Provide a summary of any litigation filed against the Proposer in the past five (5) years which is related to the services that proposer provides in the regular course of business. The summary shall state the nature of the litigation, a brief description of the case, the outcome or projected outcome, and the monetary amounts involved.**

We have had no actions, suits, proceedings, disciplinary actions or investigations, pending or threatened against our firm or any member of our firm for the entire forty-five (45) year history of our firm.

**B) Provide a financial statement, annual report, or other similar evidence of proposer's financial stability.**

Our firm would be pleased to share our Financial Statements with the Selection Committee if selected to perform services for the City.

We have practiced for over forty-five (45) years in South Florida and feel confident the City would be comfortable with our financial ability to perform under the contract.

**C) Identify the type of business entity involved (e.g. sole proprietorship, partnership, corporation, etc.). Identify whether the business entity is incorporated in Florida, another state or a foreign country.**

Our firm is a partnership incorporated in the state of Florida.

**D) Provide the Federal Employer ID number of the Proposer.**

Our Federal Employer ID number is 59-1363792.

**E) Any additional information which the proposer considers pertinent for consideration should be included in this part of the proposal.**

We do not have any additional information to include.





# SEALED DOLLAR COST BID

## Section III







# AUDIT TIME SCHEDULE

## Section IV



**Provide a detailed time schedule for this audit, including when the various personnel classifications will be assigned to the engagement.**

We offer the following proposed audit timetable for the current year services. This timetable is subject to your review and approval. We are prepared to adhere to this timetable if selected to provide your auditing services. Personnel classifications will be assigned prior to the commencement of preliminary field work.

Submit list of assistance required for preliminary and audit field work	August 2016
Commence preliminary field work	August 2016
Circulate confirmations and other correspondence	September 2016
Commence audit field work	December 2016
Issue draft financial statements	January 2017
Issue final financial statements	February 2017





# TEAM MEMBER PROFILES

## Section V





## ISRAEL GOMEZ, C.P.A. Partner

### EXPERIENCE

16 years at Keefe McCullough

### EDUCATION

B.B.A. (Accounting) University of Puerto Rico

### PROFESSIONAL ORGANIZATIONS

American Institute of Certified Public Accountants  
Florida Institute of Certified Public Accountants  
Government Finance Officers Association (U.S. and South  
Florida Chapters)

### COMMUNITY LEADERSHIP

North Springs Little League  
*(sponsor and coach)*

Coral Springs Winter Basketball  
*(sponsor and coach)*

### EXPERIENCE

Israel Gomez has attended seminars and courses dealing with accounting and audit problems, reporting and disclosure issues. These courses include accounting and reporting for nonprofit organizations, governmental entities and the federal and Florida Single Audit Acts. He is experienced and qualified with respect to “Yellow Book”, OMB Circular A-133 and Rules of the Auditor General of the State of Florida compliance auditing reporting. Israel has participated in various seminars and in-house training programs concerning the requirements of GASB-67, Financial Reporting for Pension Plans and GASB-68, Accounting and Financial Reporting for Pensions. In addition, he has assisted municipalities and other governmental entities in planning for and implementing GASB-67 and 68. Israel has been a speaker for several seminars pertaining to current Federal Accounting Standards Board (FASB) and Government Accounting Standards Board (GASB) pronouncements and regulations. He has also assisted various municipalities regarding their participation in the Certificate of Achievement for Excellence in Financial Reporting program.

Israel is a member of the Florida Government Finance Officers’ Association and the South Florida Government Finance Officers’ Association. He has also had continuous involvement as a sponsor and coach of various youth sports activities.



ISRAEL GOMEZ, C.P.A.  
Continued

**ENGAGEMENT EXPERIENCE**

Keefe McCullough Audit Engagements:

**SPECIAL TAXING DISTRICTS**

- \* Plantation Acres Improvement District

**GOVERNMENTS**

- \* City of Aventura, Florida
- \* City of Coconut Creek, Florida
- \* City of Key West, Florida
- \* City of Lake Worth, Florida
- \* City of Marathon, Florida
- \* City of South Miami, Florida
- \* City of Sunny Isles Beach, Florida
- \* City of Weston, Florida
- \* Downtown Development Authority
- \* Islamorada, Village of Islands, Florida
- \* The Town Foundation, Inc.
- \* Town of Davie, Florida
- \* Town of Golden Beach, Florida
- \* Village of Pinecrest, Florida
- \* Village of Sea Ranch Lakes, Florida

**NOT-FOR-PROFITS**

- \* Achievement and Rehabilitation Centers, Inc.
- \* American Red Cross of Greater Miami and the Keys, Inc.
- \* Association for Retarded Citizens of South Florida, Inc.
- \* BARC Housing, Inc.
- \* Better Way of Miami, Inc.
- \* Broward Children's Center, Inc.
- \* Broward County Chapter of the American Red National Cross, Inc.
- \* Broward Healthy Start Coalition, Inc.
- \* Broward Homebound Program, Inc.
- \* Broward House, Inc.
- \* CCDH, Inc.
- \* Center for Family and Child Enrichment, Inc.
- \* Cerebral Palsy Adult Home, Inc.
- \* Children's Comprehensive Care Center, Inc.
- \* The Children's Healing Institute, Inc.
- \* Children's Services Council of Broward County, Inc.

**NOT-FOR-PROFITS *Continued***

- \* Children's Services Council of Palm Beach County, Inc.
- \* Community Television Foundation of South Florida, Inc.
- \* The Dan Marino Foundation, Inc.
- \* Domestic Abuse Shelter, Inc.
- \* Episcopal Church of St. Mark the Evangelist
- \* FAU Clinical Practice Organization, Inc.
- \* The FAU Finance Corporation
- \* Feeding South Florida, Inc.
- \* First Presbyterian Continuing Church of Coral Springs, Inc.
- \* Florida International Academy, Inc.
- \* Fort Lauderdale Historical Society, Inc.
- \* Foundation for End of Life Care, Inc.
- \* Habitat for Humanity of Palm Beach County, Inc.
- \* The Haven, Inc.
- \* Healthy Start Coalition of Palm Beach County, Inc.
- \* Helping Abuse Neglected Disadvantaged Youth, Inc. (HANDY)
- \* Henderson Center Residential Service, Inc.
- \* Henderson Behavioral Health Center, Inc.
- \* Impact Broward, Inc.
- \* Jerome Golden Center for Behavioral Health, Inc.
- \* Junior Achievement of South Florida, Inc.
- \* Lighthouse of Broward County, Inc.
- \* Place of Hope, Inc.
- \* The Place of Hope at the Haven Campus, Inc.
- \* Port of Everglades Pilots Association, Inc.
- \* Port of Miami Crane Management, Inc.
- \* Riverside Christian Ministries, Inc.
- \* South County Mental Health Center, Inc.
- \* SEFLIN (Southeast Florida Library Information Network) - Wimberly Library
- \* South Florida Chapter of the Government Finance Officers Association, Inc.
- \* Southeast Florida Behavioral Health Network, Inc.
- \* Take Stock in Children, Inc.
- \* Thousand Hills Holding Company, Inc.
- \* Treasures for Hope, Inc.
- \* United States Border Control, Inc.
- \* Village of Hope of Palm Beach County, Inc.
- \* Women in Distress of Broward County, Inc.







# **BILL BENSON, C.P.A.**

## **Managing Partner**

### **EXPERIENCE**

33 years at Keefe McCullough

### **EDUCATION**

B.S. (Business Administration & Accounting)  
Washington and Lee University

### **PROFESSIONAL ORGANIZATIONS**

American Institute of Certified Public Accountants  
Florida Institute of Certified Public Accountants  
Florida Government Finance Officers Association

### **COMMUNITY LEADERSHIP**

Food for the Poor  
*(vice chair of board, treasurer, vice president)*

Catholic Community Foundation  
*(board chair, treasurer)*

Executives at Broward  
*(past president, treasurer)*

Leadership Broward

### **EXPERIENCE**

Bill Benson has attended seminars and courses dealing with accounting and audit problems, reporting and disclosure issues. These courses include accounting and reporting for nonprofit organizations, governmental entities and the federal and Florida Single Audit Acts. He is experienced and qualified with respect to “Yellow Book”, OMB Circular A-133 and Rules of the Auditor General of the State of Florida compliance auditing reporting. Bill has experience dealing directly with the State of Florida Department of Children and Families concerning various compliance, audit and other issues. Bill assists his clients in many areas of accounting including restructuring their existing loan agreements and bond indentures, developing annual operating budgets, assisting with their dealings with financial institutions and the development of business plans, financial planning and proforma financial statements. He has assisted municipalities and other governmental entities in planning for and implementing GASB-67, Financial Reporting for Pension Plans and GASB-68, Accounting and Financial Reporting for Pensions.

Bill takes great pride in his community involvement. He is the Vice President of the Board of Directors of St. Thomas Aquinas High School Foundation. He is Vice President of the Board of Directors of Food for the Poor. He is board chair and treasurer of the Catholic Community Foundation of the Archdiocese of Miami and a member of the Finance Council of the Archdiocese of Miami.

BILL BENSON, C.P.A.  
Continued

## ENGAGEMENT EXPERIENCE

Keefe McCullough Audit Engagements:

### GOVERNMENTS

- \* Broward County League of Cities, Inc.
- \* City of Aventura, Florida
- \* City of Hollywood (Internal audit)
- \* City of Key West, Florida
- \* City of Marathon, Florida
- \* City of Margate, Florida
- \* City of Miami, Florida
- \* City of Plantation, Florida
- \* City of South Miami, Florida
- \* City of Weston, Florida
- \* Islamorada, Village of Islands, Florida
- \* The Town Foundation, Inc.
- \* Town of Surfside, Florida
- \* Village of Pinecrest, Florida

### SPECIAL TAXING DISTRICTS

- \* Boynton Village Community Development District
- \* Coral Springs Improvement District
- \* Downtown Development Authority
- \* Fiddler's Creek II Community Development District
- \* Gateway Services Community Development District
- \* Heritage Harbour Market Place Community Development District
- \* Heritage Harbour South Community Development District
- \* Hillsboro Inlet District
- \* Key Largo Fire Rescue and EMS District
- \* Lake Powell Community Development District
- \* Landmark at Doral Community Development District
- \* Lexington Oaks Community Development District
- \* Meadow Pointe Community Development District
- \* North Springs Improvement District
- \* Old Palm Community Development District
- \* Orchid Grove Community Development District
- \* Park Place Community Development District
- \* Sarasota National Community Development District
- \* South Dade Venture Community Development District
- \* Stevens Plantation Community Development District
- \* Stonegate Community Development District
- \* StoneLake Ranch Community Development District
- \* Treaty Oaks Community Development District
- \* University Square Community Development District
- \* Verandah West Community Development District
- \* Viera East Community Development District
- \* VillaSol Community Development District
- \* Vizcaya Community Development District
- \* Wentworth Estates Community Development District
- \* Woodland Hammock Community Development District





## MARC A. GRACE, C.P.A.

### Associate Partner

#### EXPERIENCE

11 years at Keefe McCullough  
1 year at City of Plantation  
2 years at Morgan Stanley

#### EDUCATION

B.A. (Business Administration) Nova Southeastern University  
MACC (Accounting) Nova Southeastern University

#### PROFESSIONAL EXPERIENCE

American Institute of Certified Public Accountants  
Florida Institute of Certified Public Accountants  
Florida Government Finance Officers Association  
GFOA Special Review Committee

#### COMMUNITY INVOLVEMENT

Coconut Creek Youth Flag Football Coach

#### EXPERIENCE

Marc Grace has attended seminars and courses dealing with accounting and audit problems, reporting and disclosure issues. These courses include accounting and reporting for nonprofit organizations, governmental entities and the federal and Florida Single Audit Acts. He is experienced and qualified with respect to “Yellow Book”, OMB Circular A-133 and Rules of the Auditor General of the State of Florida compliance auditing reporting. Marc has assisted municipalities and other governmental entities in planning for and implementing GASB-67, Financial Reporting for Pension Plans and GASB-68, Accounting and Financial Reporting for Pensions. He assists his clients in many areas of accounting including restructuring their existing loan agreements and bond indentures, developing annual operating budgets, assisting with their dealings with financial institutions and the development of business plans, financial planning and proforma financial statements.

Marc focuses much of his work in the local government, not-for-profit and employee benefit plan sectors. Marc is actively involved in training for the professional staff and is responsible for developing internal training programs for the governmental, not-for profit, and ERISA sectors as well as external, financial reporting and operational matter.

MARC GRACE, C.P.A.

Continued

## ENGAGEMENT EXPERIENCE

Keefe McCullough Audit Engagements:

### GOVERNMENTS

- \* City of Key West, Florida
- \* City of Lake Worth, Florida
- \* City of Marathon, Florida
- \* City of Plantation, Florida
- \* City of Sunny Isles Beach, Florida
- \* Islamorada, Village of Islands, Florida

### SPECIAL TAXING DISTRICTS

- \* Boynton Village Community Development District
- \* Coral Springs Improvement District
- \* Deer Island Community Development District
- \* Downtown Development Authority
- \* Downtown Fort Lauderdale Transportation Management Association, Inc.
- \* Fiddler's Creek II Community Development District
- \* Florida Atlantic Research and Development Authority
- \* Key Largo Fire Rescue and EMS District
- \* Lake Powell Community Development District
- \* Landmark at Doral Community Development District
- \* Lexington Oaks Community Development District
- \* Meadow Pointe Community Development District
- \* Mediterra North Community Development District
- \* Mediterra South Community Development District
- \* Messianique Training Center & Institute, Inc.
- \* Miromar Lakes Community Development District
- \* North Springs Improvement District
- \* Palm Bay Community Development District
- \* Park Place Community Development District
- \* Parklands West Community Development District
- \* Sarasota National Community Development District
- \* Stevens Plantation Community Development District
- \* StoneLake Ranch Community Development District
- \* University Square Community Development District
- \* Verandah West Community Development District

### NOT-FOR-PROFITS

- \* Achievement and Rehabilitation Centers
- \* Almarie Outreach Ministries, Inc.
- \* Ann Storck Center, Inc.
- \* BARC Housing, Inc.
- \* Broward County Bar Association, Inc.
- \* Broward House, Inc.
- \* Center for Family and Child Enrichment, Inc.
- \* Center for Independent Living of South Florida, Inc.
- \* Children's Diagnostic & Treatment Center, Inc.
- \* FAU Clinical Practice Organization, Inc.
- \* FAU Finance Corporation
- \* Feeding South Florida, Inc.
- \* Jewish Association for Residential Care, Inc.
- \* The Slomin Family Center for Autism and Related Disabilities, Inc.
- \* South County Mental Health Center, Inc.

### FOUNDATIONS

- \* Broward College Foundation, Inc.
- \* Community Television Foundation of South Florida, Inc.
- \* Community Foundation of Broward, Inc.
- \* The Dan Marino Foundation, Inc.
- \* Florida Atlantic University Foundation, Inc.
- \* South County Foundation for Mental Health
- \* WPBT Communications Foundation, Inc.



# ATTACHMENTS

## Section VI



AJK

AJK, LLC

CERTIFIED PUBLIC ACCOUNTANTS

P.O. Box 609 □ 405 Second Street □ Manchester, GA 31816  
(706) 846-8401 □ Fax (706) 846-3370

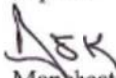
## SYSTEM REVIEW REPORT

To the owners  
Keefe, McCullough & Co., LLP  
And the Peer Review Committee of the Florida Institute of CPAs

We have reviewed the system of quality control for the accounting and auditing practice of Keefe, McCullough & Co., LLP (the firm) in effect for the year ended August 31, 2014. Our peer review was conducted in accordance with the Standards for Performing and Reporting on Peer Reviews established by the Peer Review Board of the American Institute of Certified Public Accountants. As a part of our peer review, we considered reviews by regulatory entities, if applicable, in determining the nature and extent of our procedures. The firm is responsible for designing a system of quality control and complying with it to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Our responsibility is to express an opinion on the design of the system of quality control and the firm's compliance therewith based on our review. The nature, objectives, scope, limitations of, and the procedures performed in a System Review are described in the standards at [www.aicpa.org/prsummary](http://www.aicpa.org/prsummary).

As required by the standards, engagements selected for review included engagements performed under *Government Auditing Standards* and audits of employee benefit plans.

In our opinion, the system of quality control for the accounting and auditing practice of Keefe, McCullough & Co., LLP in effect for the year ended August 31, 2014, has been suitably designed and complied with to provide the firm with reasonable assurance of performing and reporting in conformity with applicable professional standards in all material respects. Firms can receive a rating of *pass*, *pass with deficiency(ies)*, or *fail*. Keefe, McCullough & Co., LLP has received a peer review rating of *pass*.

  
Manchester, Georgia  
December 4, 2014

MEMBERS OF  
AMERICAN INSTITUTE OF CERTIFIED PUBLIC ACCOUNTANTS  
GEORGIA SOCIETY OF CERTIFIED PUBLIC ACCOUNTANTS





**FICPA Peer Review Program**  
Administered in Florida by the  
Florida Institute of CPAs



**AICPA Peer Review Program**  
Administered in Florida by the  
Florida Institute of CPAs

March 26, 2015

Joseph D. Leo, CPA  
Keefe, McCullough & Co., LLP  
6550 N Federal Hwy., Ste. 410  
Fort Lauderdale, FL 33308

Dear Mr. Leo:

It is my pleasure to notify you that on March 19, 2015 the Florida Peer Review Committee accepted the report on the most recent system peer review of your firm. The due date for your next review is February 28, 2018. This is the date by which all review documents should be completed and submitted to the administering entity. If your due date falls between January and April, you can arrange to have your review a few months earlier to avoid having a review during tax season.

As you know, the report had a peer review rating of pass. The Committee asked me to convey its congratulations to the firm.

Sincerely,

Paul N. Brown, CPA, CGMA  
Director of Technical Services

cc: David C. Jordan, CPA

Firm Number: 10036786

Review Number: 366979





## PEER REVIEW PROGRAM

is proud to present this  
Certificate of Recognition  
to

### **KEEFE, MCCULLOUGH & COMPANY, LLP**

*For having a system of quality control for its accounting and auditing practice in effect for the year ended August 31, 2014 which has been designed to meet the requirements of the quality control standards for an accounting and auditing practice established by the AICPA and which was complied with during the year then ended to provide the firm with reasonable assurance of conforming with professional standards.*

Anita Ford, Chair  
AICPA Peer Review Board  
2015





**ACKNOWLEDGMENT AND SIGNATURE PAGE**

This form must be completed and submitted by the date and the time of bid opening.

Legal Company Name (include d/b/a if applicable) Kcfe McCullough Federal Tax Identification Number: 59-1363792

If Corporation - Date Incorporated/Organized: \_\_\_\_\_

State Incorporated/Organized: \_\_\_\_\_

Company Operating Address: 6550 N Federal Hwy, 4th Floor

City Ft. Lauderdale State FL Zip Code 33308

Remittance Address (if different from ordering address): \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Company Contact Person: William G. Benson, C.P.A. Email Address: Bill.Benson@kmc CPA.com

Phone Number (include area code): 954-771-0896 Fax Number (include area code): 954-938-9353

Company's Internet Web Address: KMCcpa.com

IT IS HEREBY CERTIFIED AND AFFIRMED THAT THE BIDDER/PROPOSER CERTIFIES ACCEPTANCE OF THE TERMS, CONDITIONS, SPECIFICATIONS, ATTACHMENTS AND ANY ADDENDA. THE BIDDER/PROPOSER SHALL ACCEPT ANY AWARDS MADE AS A RESULT OF THIS SOLICITATION. BIDDER/PROPOSER FURTHER AGREES THAT PRICES QUOTED WILL REMAIN FIXED FOR THE PERIOD OF TIME STATED IN THE SOLICITATION.

 CPA Bidder/Proposer's Authorized Representative's Signature:      8/18/2016 Date

Type or Print Name: William G. Benson, C.P.A.

THE EXECUTION OF THIS FORM CONSTITUTES THE UNEQUIVOCAL OFFER OF BIDDER/PROPOSER TO BE BOUND BY THE TERMS OF ITS PROPOSAL. FAILURE TO SIGN THIS SOLICITATION WHERE INDICATED BY AN AUTHORIZED REPRESENTATIVE SHALL RENDER THE BID/PROPOSAL NON-RESPONSIVE. THE CITY MAY, HOWEVER, IN ITS SOLE DISCRETION, ACCEPT ANY BID/PROPOSAL THAT INCLUDES AN EXECUTED DOCUMENT WHICH UNEQUIVOCALLY BINDS THE BIDDER/PROPOSER TO THE TERMS OF ITS OFFER.

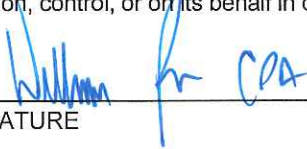
**ANY EXCEPTION, CHANGES OR ALTERATIONS TO THE GENERAL TERMS AND CONDITIONS, HOLDHARMLESS/INDEMNITY DOCUMENT OR OTHER REQUIRED FORMS MAY RESULT IN THE BID/PROPOSAL BE DEEMED NON-RESPONSIVE AND DISQUALIFIED FORM THE AWARD PROCESS.**

**HOLD HARMLESS AND INDEMNITY CLAUSE**

Keefe McCullough, William G. Benson, C.P.A.

**(Company Name and Authorized Representative's Name)**

, the contractor, shall indemnify, defend and hold harmless the City of Hollywood, its elected and appointed officials, employees and agents for any and all suits, actions, legal or administrative proceedings, claims, damage, liabilities, interest, attorney's fees, costs of any kind whether arising prior to the start of activities or following the completion or acceptance and in any manner directly or indirectly caused, occasioned or contributed to in whole or in part by reason of any act, error or omission, fault or negligence whether active or passive by the contractor, or anyone acting under its direction, control, or on its behalf in connection with or incident to its performance of the contract.

  
SIGNATURE

William G. Benson, C.P.A.  
PRINTED NAME

Keefe McCullough  
COMPANY OF NAME

8/18/2016  
DATE

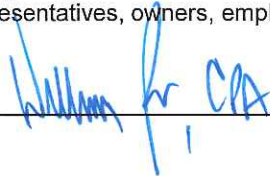
**Failure to sign or changes to this page shall render your bid non-responsive.**

**NONCOLLUSION AFFIDAVIT**

STATE OF: Florida

COUNTY OF: Broward, being first duly sworn, deposes and says that:

- (1) He/she is Partner of Keefe McCullough, the Bidder that has submitted the attached Bid.
- (2) He/she has been fully informed regarding the preparation and contents of the attached Bid and of all pertinent circumstances regarding such Bid;
- (3) Such Bid is genuine and is not a collusion or sham Bid;
- (4) Neither the said Bidder nor any of its officers, partners, owners, agents, representatives, employees or parties in interest, including this affiant has in any way colluded, conspired, connived or agreed, directly or indirectly with any other Bidder, firm or person to submit a collusive or sham Bid in connection with the contractor for which the attached Bid has been submitted or to refrain from bidding in connection with such contract, or has in any manner, directly or indirectly, sought by agreement or collusion or communication or conference with any other Bidder, firm or person to fix the price or prices, profit or cost element of the Bid price or the Bid price of any other Bidder, or to secure an advantage against the City of Hollywood or any person interested in the proposed Contract; and
- (5) The price or prices quoted in the attached Bid are fair and proper and are not tainted by any collusion, conspiracy, connivance or unlawful agreement on the part of the Bidder or any of its agents, representatives, owners, employees, or parties in interest, including this affiant.

(SIGNED)  Partner  
 Title

**Failure to sign or changes to this page shall render your bid non-responsive.**

**SWORN STATEMENT PURSUANT TO SECTION 287.133 (3) (a) FLORIDA  
STATUTES ON PUBLIC ENTITY CRIMES**

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

1. This form statement is submitted to City of Hollywood, Florida  
by William G. Benson, C.P.A. for Keefe McCullough  
(Print individual's name and title) (Print name of entity submitting sworn statement)  
whose business address is 6550 N Federal Hwy, 4th Floor, Ft. Lauderdale, FL 33308  
and if applicable its Federal Employer Identification Number (FEIN) is 59-1363792. If the entity has no FEIN,  
include the Social Security Number of the individual signing this sworn statement.

2. I understand that "public entity crime," as defined in paragraph 287.133(1)(g), Florida Statutes, means a violation of any state or federal law by a person with respect to and directly related to the transaction of business with any public entity or with an agency or political subdivision of any other state or with the United States, including, but not limited to, any bid, proposal, reply, or contract for goods or services, any lease for real property, or any contract for the construction or repair of a public building or public work, involving antitrust, fraud, theft, bribery, collusion, racketeering, conspiracy, or material misinterpretation.

3. I understand that "convicted" or "conviction" as defined in Paragraph 287.133(1)(b), Florida Statutes, means a finding of guilt or a conviction of a public entity crime, with or without an adjudication of guilt, in an federal or state trial court of record relating to charges brought by indictment or information after July 1, 1989, as a result of a jury verdict, nonjury trial, or entry of a plea of guilty or nolo contendere.

4. I understand that "Affiliate," as defined in paragraph 287.133(1)(a), Florida Statutes, means:

1. A predecessor or successor of a person convicted of a public entity crime, or
2. An entity under the control of any natural person who is active in the management of the entity and who has been convicted of a public entity crime. The term "affiliate" includes those officers, directors, executives, partners, shareholders, employees, members, and agents who are active in the management of an affiliate. The ownership by one person of shares constituting a controlling interest in another person, or a pooling of equipment or income among persons when not for fair market value under an arm's length agreement, shall be a prima facie case that one person controls another person. A person who knowingly enters into a joint venture with a person who has been convicted of a public entity crime in Florida during the preceding 36 months shall be considered an affiliate.

5. I understand that "person," as defined in Paragraph 287.133(1)(e), Florida Statutes, means any natural person or any entity organized under the laws of any state or of the United States with the legal power to enter into a binding contract and which bids or applies to bid on contracts let by a public entity, or which otherwise transacts or applies to transact business with a public entity. The term "person" includes those officers, executives, partners, shareholders, employees, members, and agents who are active in management of an entity.

6. Based on information and belief, the statement which I have marked below is true in relation to the entity submitting this sworn statement. (Please indicate which statement applies.)

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

The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime subsequent to July 1, 1989.

The entity submitting this sworn statement, or one or more of its officers, directors, executives, partners, shareholders, employees, members, or agents who are active in the management of the entity, or an affiliate of the entity has been charged with and convicted of a public entity crime, but the Final Order entered by the Hearing Officer in a subsequent proceeding before a Hearing Officer of the State of the State of Florida,

Issue Date

Division of Administrative Hearings, determined that it was not in the public interest to place the entity submitting this sworn statement on the convicted vendor list. (attach a copy of the Final Order).

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

William G. Benson, CPA  
(Signature)

Sworn to and subscribed before me this 18 day of August, 2016.

Personally known William G. Benson

Or produced identification \_\_\_\_\_ Notary Public-State of Florida County of Broward

\_\_\_\_\_ my commission expires 5-27-19  
(Type of identification)

Kaitlin F. Chubek  
(Printed, typed or stamped commissioned name of notary public)



**Failure to sign or changes to this page shall render your bid non-responsive.**

**CERTIFICATIONS REGARDING DEBARMENT, SUSPENSION AND OTHER  
RESPONSIBILITY MATTERS**

The applicant certifies that it and its principals:

- (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, sentenced to a denial of Federal benefits by a State or Federal court, or voluntarily excluded from covered transactions by any Federal department or agency;
- (b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction, violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
- (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with commission of any of the offenses enumerated in paragraph (b) of this certification; and
- (d) Have not within a three-year period preceding this application had one or more public transactions (Federal, State, or local) terminated for cause or default.

Applicant Name and Address:

Keefe McCullough  
6550 N Federal Hwy, 4th Floor  
Ft. Lauderdale, FL 33308

Application Number and/or Project Name:

RFP-4505-16-RD, Financial Auditing Services

Applicant IRS/Vendor Number: \_\_\_\_\_

Type/Print Name and Title of Authorized Representative:

William G. Benson, C.P.A., Partner

Signature:  Date: 8/18/2016

**Failure to sign or changes to this page shall render your bid non-responsive.**

**DRUG-FREE WORKPLACE PROGRAM**

IDENTICAL TIE BIDS - Preference shall be given to businesses with drug-free workplace programs. Whenever two or more bids which are equal with respect to price, quality, and service are received by the State or by any political subdivision for the procurement of commodities or contractual services, a bid received from a business that certifies that it has implemented a drug-free workplace program shall be given preference in the award process. Established procedures for processing tie bids will be followed if none of the tied vendors have a drug-free workplace program. In order to have a drug-free workplace program, a business shall:

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

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

  
\_\_\_\_\_  
VENDOR'S SIGNATURE

William G. Benson, C.P.A.  
\_\_\_\_\_  
PRINTED NAME

Keefe McCullough  
\_\_\_\_\_  
NAME OF COMPANY





Issue Date \_\_\_\_\_

**REFERENCE QUESTIONNAIRE**

It is the responsibility of the contractor/vendor to provide a minimum of three (3) similar type references using this form and to provide this information with your submission. Failure to do so may result in the rejection of your submission.

Giving reference for: Keefe McCullough

Firm giving Reference: City of Key West, Florida

Address: 3104 Flagler Avenue, Key West, FL 33040

Phone: 305-809-3821

Fax: 305-809-3886

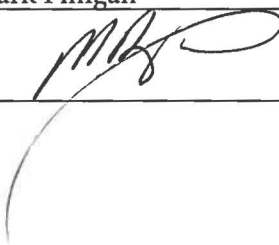
Email: MFinigan@cityofkeywest-fl.gov

- 1. Q: What was the dollar value of the contract?  
A: \$120,000/year
- 2. Have there been any change orders, and if so, how many?  
A: None
- 3. Q: Did they perform on a timely basis as required by the agreement?  
A: Yes
- 4. Q: Was the project manager easy to get in contact with?  
A: Yes
- 5. Q: Would you use them again?  
A: Yes
- 6. Q: Overall, what would you rate their performance? (Scale from 1-5)  
A:  5 Excellent  4 Good  3 Fair  2 Poor  1 Unacceptable

7. Q: Is there anything else we should know, that we have not asked?  
A: Great Partnership. Fair, Always Available, Constructive, and Advisory. They strive to improve your financial systems

The undersigned does hereby certify that the foregoing and subsequent statements are true and correct and are made independently, free from vendor interference/collusion.

Name: Mark Finigan Title: Finance Director

Signature:  Date: August 3, 2016

Issue Date \_\_\_\_\_

### REFERENCE QUESTIONNAIRE

It is the responsibility of the contractor/vendor to provide a minimum of three (3) similar type references using this form and to provide this information with your submission. Failure to do so may result in the rejection of your submission.

Giving reference for: Keefe McCullough

Firm giving Reference: City of Plantation, Florida

Address: 400 NW 73rd Avenue, Plantation, FL 33317

Phone: 954-797-2202

Fax: 954-797-2756

Email: AOtiniano@plantation.org

1. **Q:** What was the dollar value of the contract?  
**A:** \$95,750/year
2. **Q:** Have there been any change orders, and if so, how many?  
**A:** None
3. **Q:** Did they perform on a timely basis as required by the agreement?  
**A:** Yes
4. **Q:** Was the project manager easy to get in contact with?  
**A:** Yes
5. **Q:** Would you use them again?  
**A:** Absolutely
6. **Q:** Overall, what would you rate their performance? (Scale from 1-5)  
**A:**  5 Excellent  4 Good  3 Fair  2 Poor  1 Unacceptable
7. **Q:** Is there anything else we should know, that we have not asked?  
**A:** Keefe McCullough are reliable, thorough, and easy to work with.

The undersigned does hereby certify that the foregoing and subsequent statements are true and correct and are made independently, free from vendor interference/collusion.

Name: Anna C. Otiniano Title: Finance Director

Signature:  Date: August 3, 2016

Issue Date \_\_\_\_\_

### REFERENCE QUESTIONNAIRE

It is the responsibility of the contractor/vendor to provide a minimum of three (3) similar type references using this form and to provide this information with your submission. Failure to do so may result in the rejection of your submission.

Giving reference for: Keefe McCullough

Firm giving Reference: Town of Davie

Address: 6591 Orange Drive, Davie, FL 33314

Phone: 954-797-1050

Fax: 954-797-1049

Email: William Ackerman@davie-fl.gov

1. Q: What was the dollar value of the contract?  
A: \$71,500/year
2. Have there been any change orders, and if so, how many?  
A: None
3. Q: Did they perform on a timely basis as required by the agreement?  
A: Yes
4. Q: Was the project manager easy to get in contact with?  
A: Yes
5. Q: Would you use them again?  
A: Yes
6. Q: Overall, what would you rate their performance? (Scale from 1-5)  
A:  5 Excellent  4 Good  3 Fair  2 Poor  1 Unacceptable
7. Q: Is there anything else we should know, that we have not asked?  
A: They've done a great job for the Town of Davie

The undersigned does hereby certify that the foregoing and subsequent statements are true and correct and are made independently, free from vendor interference/collusion.

Name: William Ackerman Title Budget and Finance Director

Signature: William W. Ackerman Date: August 3, 2016

# Keefe McCullough

CPA's + Trusted Advisors



6550 N. Federal Highway  
4th Floor  
Fort Lauderdale, FL 33308



[support@KMCcpa.com](mailto:support@KMCcpa.com)



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



954.771.0896