

**TOWN OF WATERFORD
GENERAL FUND
2023 - 2024 PROPOSED BUDGET**

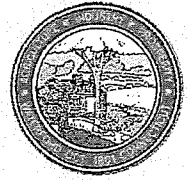
DEPT/AGENCY:

10104

ASSESSOR

LINE ITEM	DESCRIPTION	2021/2022 ACTUAL EXPENDED	2022/2023 RTM APPROP.	2022/2023 ADDITIONAL/ TRANSFERS	ACTUAL EXPEND & ENCUMB AS OF 1/1/23	2023/2024 DEPT/ AGENCY REQUEST	Department Request \$ Increase	Department Request % Increase
PERSONNEL COSTS								
51110	ADMINISTRATION	158,652	169,295	(25,000)		192,597	23,302	13.76%
51210	CLERICAL/TECHNICAL	61,369	62,224			66,342	4,118	6.62%
51810	OVERTIME	0	0			0	0	
51910	FRINGE BENEFITS	287	0			0	0	0.00%
51920	F.I.C.A	15,204	17,711			19,809	2,098	11.85%
	SUBTOTAL	235,512	249,230	(25,000)	0	278,748	29,518	11.84%
SERVICES								
52010	ADVERTISING	0	400			400	0	0.00%
52020	POSTAGE	1,628	1,068			1,650	582	54.49%
52030	PROFESSIONAL FEES	93,853	250	25,000		250	0	0.00%
52040	SERVICE CONT & REPAIRS	6,175	5,921			6,236	315	5.32%
52050	DUES, CONF., & EDUCATION	1,409	1,825			2,855	1,030	56.44%
	SUBTOTAL	103,065	9,464	25,000	0	11,391	1,927	20.36%
MATERIALS & SUPPLIES								
53020	OTHER SUPPLIES	83	150			150	0	0.00%
53200	PRICING BOOKS	1,425	500			1,859	1,359	271.80%
	SUBTOTAL	1,508	650	0	0	2,009	1,359	209.08%
DEPARTMENT TOTAL		340,085	259,344	0	0	292,148	32,804	12.65%

**TOWN OF WATERFORD
FY2024 BUDGET REQUEST
DEPARTMENT:**



Assessor

BUDGET FUNCTION

The Assessment Division is responsible for the discovery, listing and equitable valuation of all real and personal property within the Town of Waterford in accordance with Connecticut State Statutes at 70% of fair market value for the annual compilation of the Grand List. Additionally, the Assessor and staff administer state and local programs of tax relief, apply exemptions as permitted by state law, assist the public with a variety of inquiries and provide data to various entities including the State Office of Policy and Management.

The Assessor's office also maintains an up-to-date inventory of all property, including land and improvements thereon, changes in ownership, new construction, alterations, parcel and map changes and sub-divisions filed as of the assessment date. Assessment staff inspects and values all permit activity within the Town of Waterford annually, and the revaluation of all real property town-wide is conducted once every 5 years as defined by Connecticut State Statutes.

TOWN OF WATERFORD
FY2024 BUDGET REQUEST
DEPARTMENT:



BUDGET SUMMARY

Line Item	FY 2022 Appropriated	FY2023 Appropriated	FY 2024 Request	Change from FY 2023 (+/-) \$0
PERSONNEL COSTS				
51110 Administration	196,788	169,295	192,598	23,303
51210 Clerical/Technical	62,788	62,224	66,342	4,118
51810 Overtime	0	0	0	0
51910 Fringe Benefits	2408	0	0	0
51920 FICA	20,041	17,711	19,808	2,097
SUBTOTAL	282,025	249,230	278,748	29,518
SERVICES				
52010 Advertising	400	400	400	0
52020 Postage	1031	1068	1650	582
52030 Professional Fees	250	250	250	0
52040 Serv Cont & Repairs	5666	5921	6236	315
52050 Dues, Conf: & Education	1825	1825	2855	1030
52070 Reimbursable Expense	0	0	0	0
SUBTOTAL	9,172	9,464	11,391	1,927
MATERIALS & SUPPLIES				
53020 Other Supplies	150	150	150	0
53200 Pricing Books	500	500	1859	1359
SUBTOTAL	650	650	2009	1359
DEPARTMENT TOTAL	291,847	259,344	292,148	32,804

**TOWN OF WATERFORD
FY2024 BUDGET REQUEST
DEPARTMENT:**



BUDGET EXPLANATIONS BY CATEGORY

Personnel Costs: Office staff typically consists of 3 full time positions; A Certified Municipal Assessor, an Assistant Assessor and an Assessor's Aide III; and one part-time Assessor's Aide II position at 19 hours/week. The vacant Assessor position has been filled by the previous Assessor. Salaries, fringe benefits & longevity are based on rates established by union contracts.

Budget Request: **\$278,748**

11.84% increase

See the Personnel/Fringe Benefit spreadsheet for calculations.

Services: Accounts 52010-52070: Encompassing all necessary daily operating costs, including statutorily required legal ads and filing notifications, related postage costs, professional fees related to office operations, required office equipment and materials and provisions for Assessor's ongoing continuing education and staff training.

Budget Request:

- **10104-52010 – Advertising Request: \$400 0% increase**

Includes annual publication of a combined legal advertisement notifying taxpayers of state mandated exemption filing deadlines and announcing Personal Property filing requirements as mandated by state statute. An additional legal ad is published in January announcing the filing requirements for the state Elderly Homeowners/Totally Disabled tax relief program. Required notices are published in *The Day* newspaper and posted on the Town's website. The combined legal ad published in the fall is advertised jointly with 3 neighboring municipalities resulting in a cost sharing discount.

Advertising Breakdown:

Combined Legal Ad: \$250

Elderly Legal Ad: \$150

\$400

**TOWN OF WATERFORD
FY2024 BUDGET REQUEST
DEPARTMENT:**



- **10104-52020 – Postage** Request: **\$1,650** **54.50% increase**

In addition to typical correspondence with taxpayers the Assessor's Office is required by CT State Statute to send out annually the following applications/notifications to taxpayers:

Elderly Homeowners/Totally Disabled Program re-applications and reminder letters

Additional veteran's re-applications and reminder letters

Personal Property and Real Estate increase notices

Income & Expense forms for commercial/income producing properties

Postage costs incurred in FY22 = **\$1,628**

Postage Breakdown:

Monthly Correspondence: \$298 Est. at \$25/mo

Increase Notices: \$970 1385@.70

Elderly & Advets Apps/reminders: \$152 200@.70 + April nonfile cert of mailing \$12

Inc. & Expense Forms: \$230 328@.70

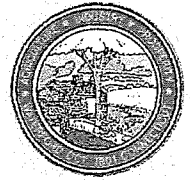
- **10104-52030 – Professional Fees** Request: **\$250**

The Assessor's Office requires direct access to the State of Connecticut's DMV CIVLS online database which allows staff members to assist taxpayers with motor vehicle situs issues and accurately determine additions/deletions to the motor vehicle grand list. The annual cost for this service is \$250.

- **10104-52040 – Service Cont & Repairs** Request: **\$6,236** **5.32% increase**

The Assessor's Office uses administrative software provided by Quality Data Service Inc. (QDS) to apply all exemptions, state and local benefits, produce required state reports and to bridge all billable accounts to the Tax Collector. While software maintenance costs related to QDS are included in the IT budget, there are additional costs attributable to QDS for necessary and required services provided to the Assessor's office. These services include the production and binding of the town's permanent

**TOWN OF WATERFORD
FY2024 BUDGET REQUEST
DEPARTMENT:**



annual Grand List books and the annual generation and mailing of online personal property filing notices with unique pin # assignment.

The Assessor's Office also leases a Xerox copy machine from Connecticut Business Systems (CBS) at a fixed cost of \$158/month.

Service Cont. Fees incurred FY22: **\$6,175**

Service Cont. & Repairs Breakdown:

QDS Grand List Binding:	\$2,977
QDS Online PP Filing:	\$1,233 <i>Estimated at 1350 accounts</i>
CBS Copier:	\$1,896
CBS Copier overage est:	<u>\$ 130</u>
	\$6,236

- **10104 – 52050 – Dues, Conf. & Education** Request: **\$2,855** **56.44% increase**

The Assessor's office has experienced significant staff turnover in the past two years. All aspects of assessment administration require formal assessment specific education and training.

Continuing Education, (50 credit hours over 5 years) is required statutorily to meet recertification standards for all Certified Connecticut Municipal Assessors. New staff will require course attendance for training in assessment administration/statutes through educational programs provided by the Connecticut Association of Assessing Officers (CAAO). Courses and workshops are offered in June at the UCONN Assessor School and throughout the year as determined annually by the CAAO's Education Committee. Additional continuing education credits for the Assessor and Assistant Assessor are offered for assessment and statute related topics throughout the year. Dues are annually recurring for the CAAO, IAAO, NRAAO and GNLA, all of which require membership as a source of assessment industry tools/information and for educational offerings at a reduced cost. CAAO membership is required to maintain CT CCMA certification.

Dues, Conf. & Education Fees incurred in FY22 to date: **\$1,409**

Assessor Dues – CAAO, NRAAO, GNLA, IAAO	\$350
Asst. Assessor Dues – CAAO, NRAAO, GNLA, IAAO	\$350
Cont. Ed – Assessor- UCONN, IAAO, workshops	\$930
UConn/Ed, workshops – Asst & Aide	<u>\$1,225</u>
	\$2,855

TOWN OF WATERFORD
FY2024 BUDGET REQUEST
DEPARTMENT:



Materials & Supplies: Accounts 53020 – 53200: Includes additional supplies and materials required to effectively operate the Assessor's office.

- **10104-53020 – Other Supplies** Request: **\$150** **0% increase**

The Assessor's office requires an allowance for miscellaneous items not provided by others. Fees incurred in FY22: **\$83** telephone headset.

- **10104-53200 – Pricing Books** Request: **\$1,859** **271.80% increase**

Pricing guides are provided through a bulk purchase contract conducted by the CAAO. JD Power (formerly NADA) has changed the base pricing for motor vehicle valuation guides to a per vehicle price. The former base price for Waterford's NADA books was \$470 and included both the fee for DMV to pre-price a majority of motor vehicles utilizing the former NADA software and one set of standard pricing guides.

The new JD Power base price for Waterford (DMV pricing) is now **\$1,675** (\$0.077 per vehicle at 20,592 vehicles plus an additional \$75 per town which covers the Truck & Trailer VIN program, the NICB guide, CAAO Motor Vehicle committee expenses and on set of books provided to OPM). Pricing guides must now be purchased separately. The Assessor's office has opted to forgo the separate pricing guides and instead has been utilizing the JD Powers Online Pricing Program for an additional fee of **\$184**.

**TOWN OF WATERFORD
PERSONNEL WORKSHEET - 04 ASSESSOR
2023-2024 FISCAL YEAR**

LINE 51920

DATE OF HIRE	EMPLOYEE	HOURS WORKED/ WEEK	HOURLY RATE FY24	SALARY 2022/2023	SALARY 2023/2024	LONGEVITY FY24	TOTAL EMPLOYEE SALARY	PAYROLL TAXES (F.I.C.A.)
51110 - ADMINISTRATION								
	ASSESSOR	40	N/A	81,000.00	120,000.00	N/A	120,000.00	9,180.00
12/07/2021	ASSISTANT ASSESSOR	40	N/A	72,597.79	72,597.79	N/A	72,597.79	5,553.73
	TOTALS			153,597.79	192,597.79	0.00	192,597.79	14,733.73
51210 - CLERICAL/TECHNICAL								
06/30/2016	ASSESSMENT AIDE III	35	\$ 23.9402	41,254.67	43,571.08	\$ -	43,571.08	3,333.19
07/01/2014	ASSESSOR AIDE I	19	\$ 23.0477	22,217.84	22,771.12	N/A	22,771.12	1,741.99
	TOTALS			63,472.51	66,342.20	0.00	66,342.20	5,075.18
51810 - OVERTIME				0.00	0.00	0.00	0.00	0.00
51910 -FRINGE/F.I.C.A:							0.00	0.00
TOTALS				217,070.30	258,939.99	0.00	258,939.99	19,808.91
BUDGET TOTAL W/F.I.C.A							278,748.90	

WORKDAYS 2023/2024

260

WEEKS TO BUDGET

52

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Town of Waterford, CT
YEAR-TO-DATE BUDGET REPORT

06/30/22



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FOR 2022 12

ACCOUNTS FOR: 04	ASSESSOR							
ORIGINAL APPROP	REVISED BUDGET	YTD EXPENDED	MTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	% USED		
101 GENERAL FUND								
10104 ASSESSOR								
44001 MAPS								
10104 44001	MAPS	0.00	0.00	-28.25	-28.25	0.00	28.25	100.0%
44003 STREET CARDS								
10104 44003	STREET CARDS	0.00	0.00	-432.00	-28.00	0.00	432.00	100.0%
TOTAL ASSESSOR		0.00	0.00	-460.25	-30.50	0.00	460.25	100.0%
TOTAL GENERAL FUND		0.00	0.00	-460.25	-30.50	0.00	460.25	100.0%
TOTAL ASSESSOR		0.00	0.00	-460.25	-30.50	0.00	460.25	100.0%
TOTAL REVENUES		0.00	0.00	-460.25	-30.50	0.00	460.25	

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Town of Waterford, CT
YEAR-TO-DATE BUDGET REPORT

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FOR 2023 05

ACCOUNTS FOR:		ORIGINAL	TRANFRS/	REVISED			AVAILABLE	PCT
101	GENERAL FUND	APPROP	ADJSTMTS	BUDGET	YTD EXPENDED	ENCUMBRANCES	BUDGET	USED
10104 ASSESSOR								
10104	44001 MAPS	0	0	0	-20.50	.00	20.50	100.0%
	TOTAL ASSESSOR	0	0	0	-20.50	.00	20.50	100.0%
	TOTAL GENERAL FUND	0	0	0	-20.50	.00	20.50	100.0%
	TOTAL REVENUES	0	0	0	-20.50	.00	20.50	

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Town of Waterford, CT
 YEAR-TO-DATE BUDGET REPORT

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FOR 2023 05

	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
GRAND TOTAL	0	0	0	-20.50	.00	20.50	100.0%

** END OF REPORT - Generated by Paige Walton **

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Town of Waterford, CT
 YEAR-TO-DATE BUDGET REPORT

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FOR 2023 05

ACCOUNTS FOR: 101 GENERAL FUND	ORIGINAL APPROP	TRANFRS/ ADJSTMTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
10104 ASSESSOR							
10104 44003 STREET CARDS	0	0	0	-169.00	.00	169.00	100.0%
TOTAL ASSESSOR	0	0	0	-169.00	.00	169.00	100.0%
TOTAL GENERAL FUND	0	0	0	-169.00	.00	169.00	100.0%
TOTAL REVENUES	0	0	0	-169.00	.00	169.00	

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Town of Waterford, CT
YEAR-TO-DATE BUDGET REPORT

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FOR 2023 05

	ORIGINAL APPROP	TRANSFERS/ ADJUSTMENTS	REVISED BUDGET	YTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
GRAND TOTAL	0	0	0	-169.00	.00	169.00	100.0%

** END OF REPORT - Generated by Paige Walton **

TOWN OF WATERFORD, CONNECTICUT
STATEMENT OF EXPENDITURES AND OTHER FINANCING USES-
ORIGINAL BUDGET AND ACTUAL-GENERAL FUND
FOR THE FIVE YEARS ENDED JUNE 30, 2022

ORG	OBJECT DESCRIPTION	FY2022 ORIGINAL BUDGET	FY2022 ACTUAL	FY2021 ORIGINAL BUDGET	FY2021 ACTUAL	FY2020 ORIGINAL BUDGET	FY2020 ACTUAL	FY2019 ORIGINAL BUDGET	FY2019 ACTUAL	FY2018 ORIGINAL BUDGET	FY2018 ACTUAL
	ASSESSOR:										
	PERSONNEL:										
10104	51110 ADMINISTRATION	196,788	158,652	196,788	196,533	196,788	201,303	191,989	198,572	178,218	187,306
10104	51210 CLERICAL AND TECHNICAL	62,788	61,369	58,818	64,060	58,818	62,080	56,123	57,490	76,428	54,114
10104	51810 OVERTIME	0	0	0	0	0	32	0	2,327	0	307
10104	51910 FRINGE BENEFITS	2,408	287	2,697	891	2,697	1,887	3,248	19,380	5,223	1,962
10104	51920 F.I.C.A.	20,041	15,204	19,761	19,009	19,761	19,402	19,230	0	19,052	18,413
	TOTAL PERSONNEL	282,025	235,512	278,064	280,493	278,064	284,703	270,590	277,770	278,921	262,102
	SERVICES:										
10104	52010 ADVERTISING	400	0	650	214	650	366	650	245	650	574
10104	52020 POSTAGE	1,031	1,628	744	1,286	744	1,364	736	353	2,340	1,641
10104	52030 PROFESSIONAL FEES	250	93,853	0	2,650	0	478	8,590	24,243	8,620	8,575
10104	52040 SERVICE CONTRACTS AND REPAIRS	5,666	6,175	1,680	5,487	1,680	2,319	16,066	13,513	14,326	12,989
10104	52050 DUES, CONFERENCES & EDUCATION	1,825	1,409	1,825	380	1,825	450	2,615	1,040	2,000	2,769
10104	52070 REIMBURSABLE EXPENSES	0	0	0	0	0	0	0	0	162	0
	TOTAL SERVICES	9,172	103,065	4,899	10,017	4,899	4,976	28,657	39,394	28,098	26,548
	MATERIALS & SUPPLIES:										
10104	53020 OTHER SUPPLIES	150	83	150	282	150	57	150	99	186	333
10104	53200 PRICING BOOKS	500	1,425	500	470	500	470	399	1,040	862	604
	TOTAL MATERIALS & SUPPLIES	650	1,508	650	752	650	527	549	1,139	1,048	937
	TOTAL ASSESSOR	291,847	340,085	283,613	291,263	283,613	290,206	299,796	318,303	308,067	289,588

**Assessor's Office****FY 2022-2023****GL 2021****Staff: Paige Walton, Nicole Serra, Kelcie Sullivan, Richard Messina**

The primary function of the Assessor's Office is the discovery listing and valuation of all taxable and tax-exempt property. Three categories of property; real estate, motor vehicle and business personal property, comprise the grand list. In compiling the annual grand list office staff regularly reviews and inspects ongoing improvements made to real property, conducts reviews and audits of business personal property equipment and maintains and values all vehicles located within the Town of Waterford as of the October 1st assessment date.

The Assessor's Office is also responsible for the administration of numerous state-mandated and local option tax exemptions and abatements such as the Tax Relief for the Elderly, Veterans, Blind and Disabled programs. In addition to the appraisal, classification and recording of all property the Assessment division must analyze and properly reflect all property transfers and ownership changes in order to maintain an accurate and current CAMA database.

Our goal is to perform responsible assessment, appraisal and administrative work to ensure uniformity and an equitable distribution of the tax burden. As well, we strive to ensure that computerized records are regularly and efficiently updated to permit prompt public access to data and to enable statutory and statistical revaluations to proceed proficiently. This includes the maintenance of accurate tax/GIS maps which requires processing and recording changes resulting from subdivisions, assemblage, boundary agreements and surveys.

The Assessment Department continues to incorporate various technological advances including online personal property declaration filing, as well as staff education, to improve our administrative processes and increase our efficiency in serving the public.

Before corrections and Board of Assessment Appeals adjustments the 2021 Net Grand List totaled \$3,512,862,470. The Board of Assessment Appeals met in the month of March and reduced the Net Grand List by \$427,500. The final 2021 taxable net Grand List as reported to OPM was:

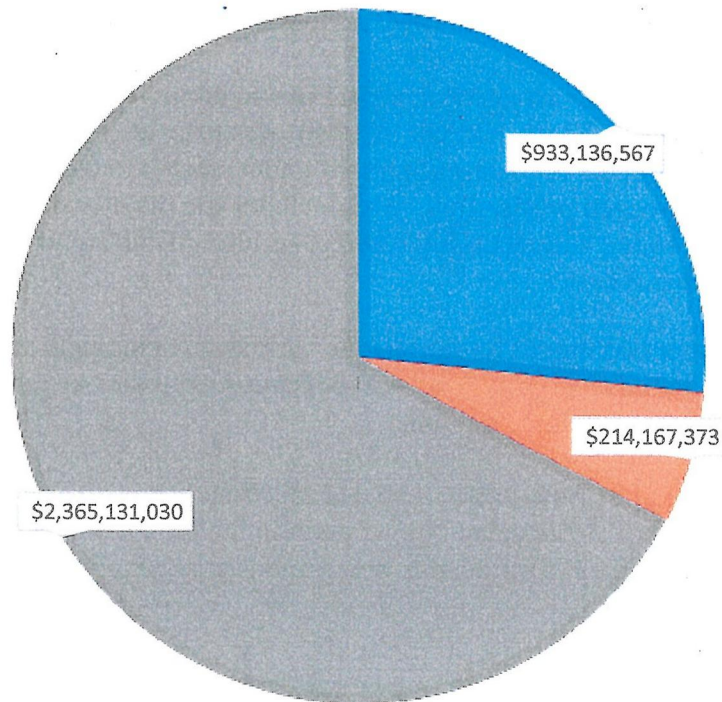
\$3,512,434,970

2021 Grand List summary:

2021 GRAND LIST OF TAXABLE AND EXEMPT				
TYPE OF ACCOUNT	# OF ACCOUNTS	GROSS ASSESSMENT	TOTAL EXEMPTIONS	TOTAL NET VALUE
REAL ESTATE REGULAR	9050	\$ 2,370,902,386.00	\$ 34,576,996.00	\$ 2,336,325,390.00
REAL ESTATE ELDERLY HOMEOWNER	225	\$ 29,752,140.00	\$ 946,500.00	\$ 28,805,640.00
TOTAL REAL ESTATE TAXABLE	9,275	\$ 2,400,654,526.00	\$ 35,523,496.00	\$ 2,365,131,030.00
REAL ESTATE EXEMPT	300	\$ 289,082,840.00	\$ 289,082,840.00	
REAL ESTATE TOTALS	9575	\$ 2,689,737,366.00	\$ 324,606,336.00	\$ 2,365,131,030.00
PERSONAL	1278	\$ 957,974,160.00	\$ 24,837,593.00	\$ 933,136,567.00
MV	20,077	\$ 217,651,283.00	\$ 3,483,910.00	\$ 214,167,373.00
TOTAL MV & PP	21,355	\$ 1,175,625,443.00	\$ 28,321,503.00	\$ 1,147,303,940.00
FINAL TOTAL		\$ 3,865,790,309.00	\$ 352,927,839.00	\$ 3,512,862,470.00
FINAL TOTAL TAXABLE M13		BAA CHANGE	\$ (427,500.00)	\$ 3,512,434,970.00

2021 GRAND LIST

■ Personal Property ■ Motor Vehicle ■ Real Estate



Summary of Change

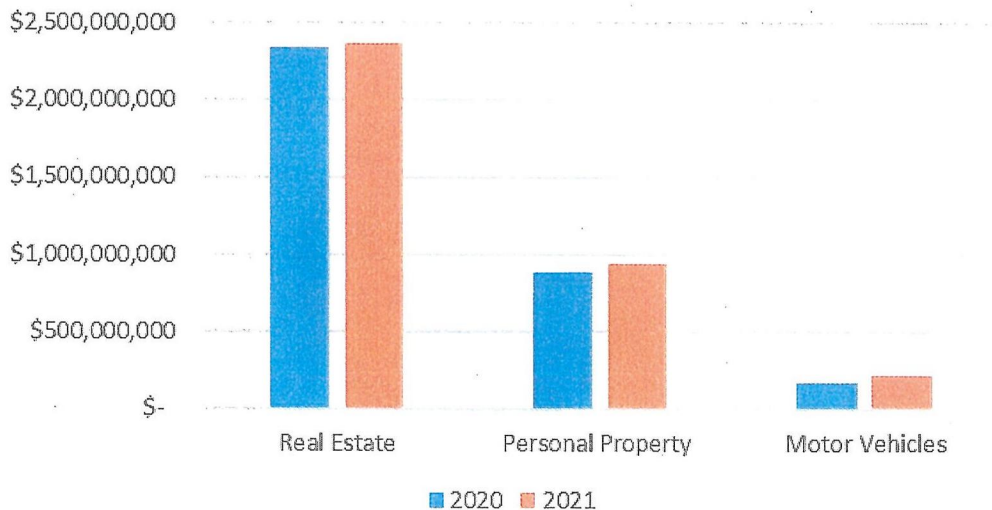
The 2021 Assessor's Grand List realized a net increase of **\$125,261,784** or a net change of 3.71%. This Grand List growth is due primarily to new construction and property improvements resulting from building permits and from a close review of property sales wherein significant property improvements were noted. Major construction projects impacting the 2021 Grand List include the new Hartford Healthcare building at 5 Dayton Road, apartments located at 171 Rope Ferry Road and sites approved for commercial development with construction underway for the Waterford Woods apartment complex on Willets Avenue and the utility scale solar facility located at 117 Oil Mill Road. The motor vehicle list included 682 fewer vehicles this year, primarily as a result of the DMV's extension on vehicle registration renewals. Despite the vehicle count decrease the demand for used cars over the past year has resulted in either value retention or appreciation. Surrounding towns have reported similar rates of increase.

- The Grand List 2021 change in each component is the result of:
- Personal Property- Values increased by 6.14% led by changes made at Dominion as well as personal property additions by CL&P.
- Real Estate- There was a 1.18% increase resulting from new construction and property improvements made town-wide.
- Motor Vehicle – The 2021 Grand List increased by 25.65%. The COVID-19 pandemic has affected all aspects of the motor vehicle industry including manufacturing, computer chip shortages and mandatory shutdowns. The significant interruption in the consumer supply chain has resulted in both an increase in demand and value across all vehicle classes.

Component	2020	2021	% Change
Real Estate	\$ 2,337,585,637	\$ 2,365,131,030	1.18%
Personal Property	\$ 879,136,394	\$ 933,136,567	6.14%
Motor Vehicles	\$ 170,451,155	\$ 214,167,373	25.65%

Assessment Change

Change Summary



Distribution of Grand List

The Grand List is comprised of 3 Stratum; Real Property, Personal Property and Motor Vehicles. The percentage distribution historically remains consistent. The charts below illustrate our Grand List structure overall and compares each sub-category of real estate and its contribution to the total net grand list.

2021 Grand List

Total Real Estate	67.33%
Personal Property	26.57%
Motor Vehicles	6.10%
	100.00%

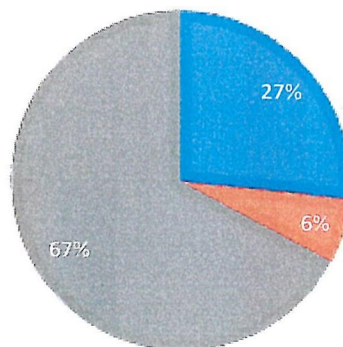
2020 Grand List

Total Real Estate	69.01%
Personal Property	25.96%
Motor Vehicles	5.03%
	100.00%

Net Grand List Comparison 2020 to 2021									
Category	2020 Grand List AFTER BAA & COCs		2021 Grand List PRE BAA		2021 Grand List Post BAA	\$ VARIANCE	% VARIANCE	% GRAND LIST	
Net Real Estate									
Residential	\$	1,499,675,200	\$	1,512,687,571	\$	1,512,636,621	\$ 12,961,421	0.86%	43.07%
Commercial	\$	822,647,753	\$	838,126,214	\$	837,807,694	\$ 15,159,941	1.84%	23.85%
Industrial	\$	339,794,190	\$	339,293,051	\$	339,293,051	\$ (501,139)	-0.15%	9.66%
Total Gross Real Estate	\$	2,662,117,143	\$	2,690,106,836	\$	2,689,737,366	\$ 27,620,223	1.04%	76.58%
Exemptions	\$	(324,531,506)	\$	(324,606,336)	\$	(324,606,336)	\$ 74,830	0.02%	
Total Net Real Estate	\$	2,337,585,637	\$	2,365,500,500	\$	2,365,131,030	\$ 27,545,393	1.18%	67.34%
Personal Property	\$	907,920,160	\$	958,032,190	\$	957,974,160	\$ 50,054,000	5.51%	27.27%
Exemptions	\$	(28,783,766)	\$	(24,837,593)	\$	(24,837,593)	\$ (3,946,173)	-13.71%	
Total Net Personal Property	\$	879,136,394	\$	933,194,597	\$	933,136,567	\$ 54,000,173	6.14%	26.57%
Motor Vehicles	\$	172,797,105	\$	217,651,283	\$	217,651,283	\$ 44,854,178	25.96%	6.20%
Exemptions	\$	(2,345,950)	\$	(3,483,910)	\$	(3,483,910)	\$ 1,137,960	48.51%	
Total Net Motor Vehicles	\$	170,451,155	\$	214,167,373	\$	214,167,373	\$ 43,716,218	25.65%	6.10%
Total Net Grand List	\$	3,387,173,186	\$	3,512,862,470	\$	3,512,434,970	\$ 125,261,784	3.70%	100.00%

DISTRIBUTION OF GRAND LIST

■ Personal Property
 ■ Motor Vehicle
 ■ Real Estate



Top Ten Taxpayers Grand List 2021 RE/PP Combined

REAL ESTATE		Net Assessed Value
Dominion Energy Nuclear CT Inc. MP#3	\$	251,405,533
Dominion Energy Nuclear Connecticut Inc.	\$	129,751,610
Dominion Energy Nuclear CT Inc MP#2	\$	74,420,093
Centro GA Waterford Commons (Waterford Commons Plaza)	\$	29,248,272
Crystal Mall LLC (Mall Stores)	\$	28,590,018
Chase Crossroads Waterford Square (Crossroads Plaza)	\$	13,976,930
Mass Municipal Wholesale Electric Co	\$	12,544,967
Wal-Mart Real Estate Business Trust	\$	12,283,794
VTR Northeast Holdings LLC	\$	11,815,950
Charter Oak Federal Credit Union	\$	11,307,540
PERSONAL PROPERTY		Net Assessed Value
Dominion Energy Nuclear Connecticut Inc	\$	722,493,958
Connecticut Light & Power Company dba Eversource	\$	102,607,680
Mass Municipal Wholesale Electric Co	\$	16,203,660
Yankee Gas Services Co	\$	11,143,430
Green Mountain Power Corp	\$	5,840,066
SEConn Fabrication LLC	\$	4,204,080
Constitution Eye Surgery Ctr East LC	\$	3,377,070
Target Corporation	\$	2,713,250
Stop & Shop Supermarket Co	\$	2,639,270
Sonalysts Inc.	\$	2,139,590
COMBINED		Net Assessed Value
Dominion Energy Nuclear Connecticut	\$	1,178,071,194
Connecticut Light & Power Co. dba Eversource	\$	102,607,680
Centro GA Waterford Commons (Waterford Commons Plaza)	\$	29,248,272
Mass Municipal Wholesale Electric	\$	28,748,627
Crystal Mall LLC (Mall Stores)	\$	28,590,018
Chase Crossroads Waterford Square (Crossroads Plaza)	\$	13,976,930
Charter Oak Federal Credit Union	\$	13,290,350
Sonalysts Inc.	\$	12,739,220
Wal-Mart Real Estate Business Trust	\$	12,283,794
VTR Northeast Holdings LLC	\$	11,815,950

Assessment Administration

The Board of Assessment Appeals conducted hearings in March over the course of two sessions. Assessment staff assists the board by performing the following duties: appellant appointment scheduling; legal ad postings; records and files meeting agendas and minutes; updates assessment changes in the CAMA and QDS system and mails action notices to all appellants per state statute.

In total, the Board heard 16 appeals and made 9 changes, including 1 change to a motor vehicle valuation appearing on the 2020 Supplemental list. The Board chose to hear appeals for commercial and industrial properties with assessed values over \$1M and made 0 changes to properties in this category.

Total 2021 GL BAA Reductions by category

	# Appeals	# Changes	# No Changes	Total BAA Reductions
Real Estate	14	7	7	(\$ 369,470.00)
Personal Property	1	1	0	(\$ 58,030.00)
Motor Vehicle**	1	1	0	(\$ 2,850.00)
*2020 Supplemental	16	9	7	(\$ 430,350.00)
		Total 2021 Reductions		(\$ 427,500.00)
Not Heard	0			
Incomplete/Late Filings				
Total Not Heard	0			

Real Estate:

Sales questionnaires continue to be sent to all new owners of real estate. The returned forms assist staff in determining the validity of sales as a reflection of the current real estate market. Staff continues to review listings of properties for sale and update real estate data as warranted. The sales validation process is recorded both locally, in the town's CAMA system, and at the state level through the OPM sales ratio database, which is integral to the state's annual compilation of the Equalized Net Grand List.

Transfers of real estate title for tax billing and ownership records are processed on an ongoing basis in the Assessor's office. From October 2021 through September 2022 a total of 1067 changes to title were processed.

Number of Documents	Q1	Q2	Q3	Q4	YTD Totals
Transfers ≥ \$2,000	142	87	137	132	498
Change or Transfer \$0	127	150	135	157	569
Transaction Totals	269	237	272	289	1067

The Assessor's Office is required to maintain accurate GIS/tax maps and process updates accordingly. Working with Tighe and Bond, the Assessor's office initiated a total of 31 map changes for the 2021 Grand List.

Staff members have processed a total of 2251 building permits this year, verifying and valuing those that reflect property improvements and changes of use.

Income and Expense forms were mailed on March 15, 2022 to all owners of commercial, income producing real estate. The deadline to file the 2021 I&E forms was June 1st, 2022. Staff collected returned forms for further analysis by the Assessor and commercial appraisers with Vision Government Solutions Inc. to establish economic income data relevant to the 2022 state-mandated revaluation.

The 2022 town-wide revaluation commenced in March 2021 with the mailing and collection of data mailers to all residential property owners. Vision data collectors visited all commercial properties to record changes, property use and condition. Residential properties were measured and listed when returned data mailers indicated a change in construction detail or when completed data mailers were not received by the Assessor's office. Revaluation staff also made site visits to all properties with outstanding building permits.

Preliminary values resulting from the 2022 revaluation will be established and impact notices mailed by November 23rd, 2022 to all property owners. Informal hearings will be conducted by telephone in mid-December for all property owners wishing to discuss their newly established valuations. The revaluation is anticipated to be finalized and certified by January 31st, 2023.

The Day

THE DAY PUBLISHING COMPANY
PO BOX 1231
47 EUGENE O'NEILL DRIVE
NEW LONDON, CT 06320-1231

ACCOUNT NUMBER	CUSTOMER	BILLING PERIOD	
D140217	EAST LYME ASSESSORS	09/01/22-09/30/22	
CLIENT	PAGE NUMBER	DUE DATE	
	Page 1 of 1	10/30/2022	
Current	Over 30 Days	Over 60 Days	Total Balance
\$967.95	\$0.00	\$0.00	\$967.95

EAST LYME ASSESSORS
PO BOX 519
NIANTIC, CT 06357
United States

MAKE CHECKS PAYABLE TO
DAY PUBLISHING COMPANY
Include your account # on
your check remittance

STATEMENT NUMBER
21951
CHECK NUMBER
AMOUNT PAID

PLEASE RETURN UPPER PORTION WITH YOUR REMITTANCE

DATE	DESCRIPTION	PUBLICATIONS	REFERENCE # PO #	SIZE/LINES OR QTY	NET AMOUNT
	Previous Balance				\$0.00
09/24/22- 09/25/22	10/1/2022 Grand List	CPNW, DAY, DCW	d01040314 10/1/2022 Grand List	3 col X 83 Lines	\$967.95

Day Credit Department
Community Classifieds - Toll Free
Day Publishing Company - Toll Free

860-701-4204
800-582-8296
800-542-3354

Accounting Fax 860-437-7504
Advertising Fax 860-437-8780
Classified Fax 860-442-5443

Billing Period	Account Number	Customer	
09/01/22-09/30/22	D140217	EAST LYME ASSESSORS	
Current Due	Over 30 Days	Over 60 Days	Total Balance
\$967.95	\$0.00	\$0.00	\$967.95

APPROVED

VENDOR# 724

PO# FY 2023

CLOSE PO Y N X X

ACCOUNT # 10104-52 010

AMOUNT \$241.99

SIGN PW

DATE 10/12/22

Paige Walton

From: Diane Vitagliano <dvitagliano@eltownhall.com>
Sent: Friday, September 2, 2022 8:57 AM
To: Daphne Doran; Melissa Kronfeld, Old Lyme Assessor; Paige Walton
Subject: RE: September 2022 Legal Notice

CAUTION: This email originated from outside of the organization.

Do not click links or open attachments unless you recognize the sender's email address and know the content is safe.

Hi All,

The bill for each town is \$241.99 per town. I will pay and if each town can make their check out to East Lyme once I get the invoice that would be great.

Diane

From: Daphne Doran <ddoran@eltownhall.com>
Sent: Thursday, September 1, 2022 4:05 PM
To: Diane Vitagliano <dvitagliano@eltownhall.com>; Melissa Kronfeld, Old Lyme Assessor <mkronfeld@oldlyme-ct.gov>; Paige Walton, Waterford Assessor <pwalton@waterfordct.org>
Subject: September 2022 Legal Notice

Good afternoon

Attached (below) is the proof of the legal notice for publication along with the cost .

If you have any questions, please let us know.

Daphne Doran | Assistant Assessor

Phone: (860) 739-6931
Email: ddoran@eltownhall.com
Address: Town of East Lyme
108 Pennsylvania Avenue
Niantic, CT 06357

www.eltownhall.com



From: legal <legal@theday.com>
Sent: Thursday, September 1, 2022 10:30 AM

Legal Notice

Towns of EAST LYME, LYME, OLD LYME AND WATERFORD, CT
Filing of Tax Lists for 10/1/2022 Grand List

The Towns of EAST LYME, LYME, OLD LYME AND WATERFORD, having separately complied with Section (B), (D), and (H) of Section 12-41 of the Connecticut General Statutes, notes that it is not necessary for persons liable for taxes on Real Estate or Automobiles actively registered with the Connecticut Department of Motor Vehicles to file tax lists with the Assessor annually as covered under Connecticut General Statute Section 12-42.

Personal Property: All owners of tangible personal property except registered Motor Vehicles are required by Connecticut General Statutes, to file with the Assessor, annually during the month of October, a listing of such business property. This property includes but is not limited to the following: Machinery, Equipment, Furniture and Fixtures etc. used in a business.

Failure to file: Section 12-42 of the Connecticut General Statutes requires the Assessor to file a listing for those who fail to file or file late and add a 25% penalty to the listing.

Please note the following:

Veterans: Veterans of any war period so declared in Section 12-81, Subsection 19 of the Connecticut General Statutes, having not previously filed for exemption within their Town, must provide an original or certified copy of the Honorable Discharge, or similar, to the Town Clerk prior to October 1, 2022.

Disabled Veterans: Veterans claiming disability exemptions for the first time must submit proof from the Veterans Administration to the Assessor before the BAA completes its duties stating the percentage of disability in order to receive the proper amount of exemption on the 2022 Grand List. All others need only file if their percentage of disability changed since 10/1/2021

Disabled Veterans Aged 65 or Older: If you are receiving additional exemptions due to a veteran's disability, you may be entitled to an additional exemption equivalent to the 100% disability rating. If you qualify and are not receiving such exemption, provide proof of age to the Assessor.

Totally Disabled: Under certain circumstances, residents who are receiving permanent disability benefits under the Federal Old Age Survivors and Disability Insurance Program or certain other qualifying programs, may be entitled to receive a \$1,000 property exemption upon submission of qualifying proof of such disability to the Assessor (as per section 12-81 subsection 55, CGS). Claims must be filed during the assessment period.

and: Proof of legal blindness, as defined in Section 12-92 of the Connecticut General Statutes. If not previously filed and allowed, must be submitted to the Assessor during the assessment period for consideration on the 10/1/2022 Grand List.

Farmers: Applications for exemption on farm machinery must be filed with the Assessor by October 31, 2022.

Farm, Forest: Owners of Real Estate qualified under various subsections of 12-107 of the Connecticut General Statutes, applying for relief under provisions of this statute must make application to the Assessor between September 1, 2022 and October 31, 2022 for the 10/1/2022 Grand List. Contact the Assessor's office for details

Local Option Exemptions: Under EAST LYME, LYME, OLD LYME AND WATERFORD Town Ordinances, a local exemption is available to owners of certain private vehicles specially equipped for the transportation of the handicapped. Details are available from the Assessor's office.

Local Option Veteran Program: Under EAST LYME, LYME, OLD LYME AND WATERFORD Town Ordinances, an additional veterans exemption may be available to qualifying Veterans. Details are available from the Assessor's office

For the purpose of fulfilling the above obligations:

East Lyme: The Assessor's Office is open at the Town Hall, 108 Pennsylvania Avenue, Niantic, CT from 8:00 A.M. to 4:00 P.M. weekdays except legal holidays.

Lyme: The Assessor's Office is open at the Town Hall, 480 Hamburg Rd, Lyme CT from 9:00 A.M. to 12:00 P.M. and 12:30 P.M. to 4:00 P.M. Monday, Tuesday, Wednesday and Friday except legal holidays.

Old Lyme: The Assessor's Office is open at the Town Hall, 52 Lyme St, Old Lyme CT from 9:00 A.M. to 4:00 P.M. weekdays except legal holidays.

Waterford: The Assessor's Office is open at the Town Hall, 15 Rope Ferry Rd, Waterford CT from 8:00 A.M. to 4:00 P.M. weekdays except legal holidays.

Dated this August 25, 2022

he Vitagliano
Assessor
Town of East Lyme, CT

Melinda Kronfeld
Assessor
Town of Old Lyme & Lyme

Paige S. Walton
Assessor
Town of Waterford, CT

Postage Statement—First-Class Mail and First-Class Package Service

Use this form for First-Class Mail and First-Class Package Service.

Post Office: Note Mail Arrival
Date & Time (Do Not Round-Stamp)

Mailer	Permit Holder Name, Address, Email, Telephone TOWN OF WATERFORD 15 ROPE FERRY ROAD WATERFORD, CT 06385 860-440-0511 amonton@waterfordct.org CAPS Cust. Ref. No. _____ CRID _____		Mailing Agent (If other than permit holder) Name, Address, Telephone _____ CRID _____		Mail Owner (If other than permit holder) Name, Address _____ CRID _____	
	Post Office of Mailing NEW LONDON, CT		Mailer's Mailing Date 11/12/22		Federal Agency Cost Code _____	
Mailing	Type of Postage ☐ Permit Imprint ☐ Precanceled Stamps ☒ Metered		Processing Category ☒ Letters ☐ Flats ☐ Parcels		For Mail Enclosed within Another Class ☐ Marketing Mail ☐ Bound Printed Matter ☐ Library Mail ☐ Periodicals ☐ Media Mail	
	Move Update Method ☒ Ancillary Service Endorsement ☐ NCOA ¹ ☐ ACS		☐ Alternative Method ☐ Multiple ☐ OneCode ACS ☐ n/a Alternative Address Format		Weight of a Single Piece 0.216 pounds Total Pieces 1274 Total Weight 27.52165	
	☐ Round Trip ONLY: One DVD/CD or other disk.		Letter or flat-size mailpieces contain: ☐ Round Trip ONLY: One DVD/CD or other disk.		Statement Seq. No. _____	
	This is a Political Campaign Mailing ☐ Yes ☒ No This is Official Election Mail ☐ Yes ☒ No		Permit # 485 No. and type of Containers _____ Sacks 2 1 ft. Letter Trays 2 2 ft. Letter Trays _____ EMM Letter Trays _____ Flat Trays _____ Pallets _____ Other			

Parts Completed (Select all that apply): ☐ A ☐ B ☐ C ☐ D ☐ S ☐ NSA	
1	Subtotal Postage (Add parts totals)
2	Price at Which Postage Affixed (Check one): ☒ Correct ☐ Lowest ☐ Neither Complete if mailing includes pieces bearing metered/PC Postage. 1274 pcs. x \$ 0.461 = Postage Affixed - 587.314
3	Incentive/Discount Flat Dollar Amount -
4	Fee Flat Dollar Amount +
5	Permit # 485 Net Postage Due (Line 1 +/- Lines 2, 3, 4)
Additional Postage Payment (State reason)	
For postage affixed, add additional payment to net postage due; for permit imprint, add additional payment to total postage.	
Total Adjusted Postage Affixed	
Postmaster: Report Total Postage in AIC 121 (Permit Imprint Only)	
Total Adjusted First-Class Mail Postage Permit Imprint	
Postmaster: Report Total Postage in AIC 128 (Permit Imprint Only)	
Total Adjusted First-Class Package Service Postage Permit Imprint	

Certification	Incentive/Discount Claimed: _____ Type of Fee: _____ The mailer's signature certifies acceptance of liability for and agreement to pay any revenue deficiencies assessed on this mailing, subject to appeal. If an agent signs this form, the agent certifies that he or she is authorized to sign on behalf of the mailer and that the mailer is bound by the certification and agrees to pay any deficiencies. In addition, agents may be liable for any deficiencies resulting from matters within their responsibility, knowledge, or control. The mailer hereby certifies that all information furnished on this form is accurate, truthful, and complete; that the mail and the supporting documentation comply with all postal standards and that the mailing qualifies for the prices and fees claimed; and that the mailing does not contain any matter prohibited by law or postal regulation. I understand that anyone who furnishes false or misleading information on this form or who omits information requested on this form may be subject to criminal and/or civil penalties, including fines and imprisonment. Privacy Notice: For information regarding our Privacy Policy visit www.usps.com .	
	Signature of Mailer or Agent BERT MONTON • TOWN OF WATERFORD	
	Printed Name of Mailer or Agent Signing Form BERT MONTON • TOWN OF WATERFORD	
Telephone 860-440-0511 Cell: 860-908-6979		

S Use Only	Weight of a Single Piece _____ pounds		Total Weight _____		Are postage figures at left adjusted from mailer's entries? ☐ Yes ☒ No If yes, reason: _____	Round Stamp (Required) Payment Date
	Total Pieces _____		Total Postage _____			
	Presort Verification Performed? (If required) ☐ Yes ☒ No					Date Mailed Notified _____ Contact _____ By (Initials) _____ Time AM PM
	I CERTIFY that this mailing has been inspected for each item below if required: (1) eligibility for postage prices claimed; (2) proper preparation (and presort where required); (3) proper completion of postage statement; (4) payment of annual fee; and (5) sufficient funds on deposit (if required)					
	USPS Employee's Signature _____					
Print USPS Employee's Name _____						

	FY22 METERED MAIL TO DATE				
	usage				
Number	Name	Items	Value		
1	1ST SELECTMAN	87	#REF!	10101-52020	
2	REGISTAR OF VOTER	3095	\$1,534.09	10102-52020	
3	COVID	0	\$115.75	101-16070	
4	ASSESSOR	3028	\$1,508.99	10104-52020	
5	BOARD OF ASSESS APEALS	15	\$75.89	10105-52020	
6	TAX COLLECTOR	12788	\$6,367.95	10106-52020	
7	FINANCE	5835	\$3,376.96	10107-52020	
8	TOWN CLERK	4344	\$3,367.18	10109-52020	
9	PLANNING AND ZONING	224	\$528.73	10110-52020	
10	ECONOMIC DEVELOPMENT	0	\$29.70	10113-52020	
11	CONSERVATION COMMISSION	36	\$72.69	10114-52020	
12	ZONING BOARD OF APPEALS	34	\$126.25	10115-52020	
13	RTM	0	\$0.00	10117-52020	
14	BUILDING DEPT.	1951	\$1,123.44	10118-52020	
15	FLOOD AND EROSION	0	\$104.86	10141-52020	
16	HARBOR MANAGEMENT	0	\$0.00	25142-52020	
17	ETHICS COMMISION	0	\$0.00	10143-52020	
18	EMERGENCY MANAGEMENT	11	\$7.04	10122-52020	
19	BUREAU OF FIRE PREVENTION	82	\$121.42	10123-52020	
20	POLICE DEPARTMENT	567	\$708.86	10129-52020	
21	PUBLIC WORKS	674	\$424.59	10130-52020	
22	HISTORIC PROPERTIES COMMISSION	44	\$91.71	10120-52635	
23	YOUTH SERVICE BUREAU	447	\$242.62	10119-52020	
24	HUMAN RESOURCES	882	\$507.90	10145-52020	
25	SENIOR CITIZENS COMMISSION	450	\$269.25	10135-52020	
26	WTFD PUBLIC LIBRARY	609	\$306.77	10136-52020	
27	RECREATION AND PARKS	950	\$453.59	10137-52020	
28	WTFD. SHELLFISH COMMISSION	0	\$89.92	20780-52020	
29	UTILITY COMMISSION	30884	\$10,993.60	60131-52020	
30	BD OF ED CENTRAL OFFICE	7783	\$8,350.20	10160-59901	
32	GREAT NECK ELEMENTRY	1123	\$1,241.25	10160-59901	
33	OSWEGATCHIE ELEMENTRY	1377	\$1,054.26	10160-59901	
34	QUAKER HILL ELEMENTRY	1311	\$903.39	10160-59901	
36	CLARK LANE MIDDLE SCHOOL	4328	\$2,984.29	10160-59901	BOE
37	WATERFORD HIGH SCHOOL	4480	\$2,969.60	10160-59901	\$17,502.99
38	REVAL	152	\$261.42	20501-57639	
39	ANIMAL CONTROL FUND RAISING	0	\$0.00	27829-52020	GG
40	TOWN CLERK ABSENTEE BALLOTS	90	\$47.70	10109-52020	#REF!
41	OPEN DOORS GRANT	0	\$0.00	21735-52020	
	TOTAL		#REF!	101-16100	#REF!

Monthly Postage
Assessor's Office

**Assessor's Office
FY21 Postage**

**BAA
FY 21 Postage**

	Metered Mail	# Items		Metered Mail	# Items
Jul-20	93.55	174		0	0
Aug-20	14.50	29		0	0
Sep-20	0.00	0		0	0
Oct-20	20.60	38		0	0
Nov-20	31.00	57		0	0
Dec-20	9.50	19		0	0
Jan-21	542.88	2331		1.5	3
Feb-21	336.78	658		19.38	38
Mar-21	192.16	376		16.83	33
Apr-21	8.16	16		0	0
May-21	9.07	17		0	0
Jun-21	28.08	53		0	0

Total Postage	\$ 1,286.28	3768	\$ 37.71	74
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FY 22 Postage

Jul-21	16.21	30	0	0
Aug-21	9.56	18	0	0
Sep-21	28.62	53	0	0
Oct-21	33.32	60	8.25	15
Nov-21	50.50	92	0	0

Total Postage	\$ 138.21	253	\$ 8.25	15
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STATE OF CONNECTICUT

DEPARTMENT OF MOTOR VEHICLES



60 State Street, Wethersfield, Connecticut 06161
ct.gov/dmv

Invoice

BILL TO
Waterford (ASSESSOR) 15 Rope Ferry Rd Waterford, Ct 06385

DATE	INVOICE #
5/31/2022	3942

DUE DATE
7/29/2022

DESCRIPTION	QTY	AMOUNT
-- PAYMENT DUE UPON RECEIPT --		
PERIOD COVERED: 7/01/22 TO 06/30/22		
YEARLY BILL FOR ONLINE ACCESS TO MOTOR VEHICLE INFORMATION. (DMV DIRECT PROGRAM)	1	250.00
* YOU ARE RESPONSIBLE FOR PAYMENT UNTIL YOU WITHDRAW FROM THE PROGRAM OR YOU HAVE BEEN NOTIFIED OF TERMINATION BY DMV		
VENDOR# 63		
PO# 104-52030		
CLOSE PO Y N		
ACCOUNT # 104-52030		
AMOUNT \$ 250.00		
SIGN [Signature]		
DATE 6/11/2022		

Please return one copy of invoice with payment.

Total	\$250.00
Payments/Credits	\$0.00
Balance Due	\$250.00

Seat Belts Do Save Lives

Teen Driving: You Risk, You Pay

Paige S. Walton

2432 Dairy Rd.

Cosby, TN 37722

Invoice Number:

2022-0024

Invoice Date:

12/05/2022

Invoice

Buyer:

Town of Waterford

15 Rope Ferry Road

Waterford, CT 06385

Shipping Address:

Town of Waterford

15 Rope Ferry Road

Waterford, CT 06385

Purchase Order Number	Purchase Order Date	Currency
N/A	12/05/2022	US Dollars

Name	Description	Unit of Measure	Qty.	Tax	Unit Price	Total
1.	11/20/2022 - 11/26/2022	Each	55.00	No	\$50.00	\$2,750.00
2.	11/27/2022- 12/03/2022	Each	55.00	No	\$50.00	\$2,750.00

**Comments: Remote and in-office
management, Ongoing 2022**

Revaluation, 2022 Grand List

Compilation, Map changes, Sales

verification, taxpayer communications

Subtotal:

\$5,500.00

Total:

\$5,500.00

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Construed in accordance with and governed by the laws of Connecticut.



Quality Data Service, Inc.
121 Mattatuck Heights Rd
Waterbury, CT 06705

www.QDS.biz

Budget Letter FY2023-24

Date	Letter/Quot...
11/22/2022	2020E6209

Name / Address

Waterford Assessor
Town Hall
15 Rope Ferry Rd.
Waterford, CT 06385

Ship To/Bill To

Description of Services

Est Qty

Total

Software Services

Annual Software Support Fee - Assessor Software

1

6,311.81

Annual Subscription Fee - Personal Property CAMA

1

2,205.00

Annual Subscription Fee - QDS Hosted Personal Property

1

303.19

Declaration Form

DRaaS - Disaster recovery as a service

84

509.36

Double Sided laser Printing & Indexing of Grand List - Regular

4

2,050.65

Permanently Binding Grand List Book(s) - Regular List

4

330.75

Double Sided laser Printing & Indexing of Grand List - MVS

1

512.66

Permanently Binding Grand List Book(s) - MVS

1

82.69

Assessor Annual Cost of Services; Maintenance of Town FTP
(File Transfer Protocol) Folder

1

551.25

Subtotal

12,857.36

PP Declarations - Printing and Mailing Services

Printing, processing, and nesting personal property online letters.

#10 Window Mailing Envelopes 24# WW - 1 sided

CASI certify File

1st Class Postage - CASS Certified Rates

Subtotal

1,350

372.10

1,400

90.00

1

82.69

1,350

688.50

1,233.29

Subtotal CONTACTUAL SERVICES

14,090.65

Grand Total

Contact

Finance Dept

e-mail

leo@qds.biz

Phone #

2037559031

Ext 6555

Leo DiNicola, CFO - 203-910-2316 (c)

Customer Acceptance Signature: _____

Print Name and Title: _____

Customer Acceptance Date: _____

PO #:

Enter Total based on options chosen

REC'D FINANCE
FEB 2 '22 PM 3:37



Quality Data Service, Inc.
121 Mattatuck Heights Rd
Waterbury CT 06705

Invoice	
Date	Invoice #
1/24/2022	2019-9648

Bill To
Waterford Assessor
Town Hall
15 Rope Ferry Rd.
Waterford, CT 06385

Ship To

PO
220464

S.O. No.	P.O. No.	Terms	Due Date	Ship Date	Ship V
		Due on receipt	1/24/2022	1/19/2022	US Mail
Description				Qty	Amount
Double Sided laser Printing & Indexing of Grand List - Regular 2021				4	1,860.00
1 RE					
2 PP					
3 MV A-L					
4 MV M-Z					
Permanently Binding Grand List Book(s) - Regular List 2021				4	300.00
APPROVED					
VENDOR# <u>749</u>					
PO# _____ FY <u>2022</u>					
CLOSE PO Y _____ N _____					
ACCOUNT # <u>10104-52040</u>					
AMOUNT <u>\$2,160.00</u>					
SIGN <u>PW</u>					
DATE <u>2/2/2022</u>					

Contact	Leo DiNicola CFO
Phone #	2037559031
Fax #	203-574-4360
e-mail	LEO@QDS.BIZ
Web Site	www.qds.biz

Total Due	\$2,160.00
Payments/Credits	\$0.00
Balance Due	\$2,160.00



Purchase Order

Fiscal Year 2022

Page: 1 of: 1

THIS NUMBER MUST APPEAR ON ALL
INVOICES, PACKAGES AND SHIPPING PAPER

Purchase
Order #

220464

Terms and Conditions under which this order is
issued can be found on the town's website at:
www.waterfordct.org

ILL
TO

TOWN OF WATERFORD
ATTN: TAX ASSESSOR
15 ROPE FERRY
WATERFORD, CT 06385

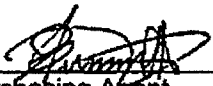
V
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QUALITY DATA SERVICE INC
121 MATTATUCK HEIGHTS RD
WATERBURY, CT 06705

S
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P
T
O

TOWN OF WATERFORD
TAX ASSESSOR OFFICE
15 ROPE FERRY RD
WATERFORD, CT 06385

Vendor Phone Number		Requisition Number		Delivery Reference		
203-755-9031		220551				
Date Ordered	Vendor Number	Freight Method/Terms		Department/Location		
02/16/2022	749			TAX ASSESSOR		
Item#	Description/PartNo		QTY	UOM	Unit Price	Extended Price
	QUALITY DATA SERVICES - GL BIN					
1	GL 2021 BINDING/PRINTING INVOICE #2019-9648		1.0	EACH	\$2,160.00	\$2,160.00

By: 
Purchasing Agent

VENDOR COPY

Total Ext. Price	\$2,160.00
PO Total	\$2,160.00



Quality Data Service, Inc.
121 Mattatuck Heights Rd
Waterbury CT 06705

Invoice	
Date	Invoice #
10/5/2022	2019-12132

Bill To
Waterford Assessor
Town Hall
15 Rope Ferry Rd.
Waterford, CT 06385

Ship To

FILE COPY

S.O. No.	P.O. No.	Terms	Due Date	Ship Date	Ship Via	Tracking #
		Due on receipt	10/5/2022	9/23/2022	US Mail	
Description				Qty	Amount	
PP Declarations - Printing and Mailing Services						
Printing, processing, and nesting personal property online letters.				1,295	339.94	
#10 Window Mailing Envelopes 24# WW - 1 sided				1,400	98.01	
CASI certify File				1	78.75	
1st Class Postage - CASS Certified Rates				1,295	621.34	
APPROVED						
VENDOR# 749						
O# FY 2023						
USE PO Y N						
AMOUNT # 10104-52040						
AMOUNT 1,138.04						
SIGN						

DATE 10/7/2022

Contact	Leo DiNicola CFO
Phone #	2037559031
Fax #	203-574-4360
e-mail	leo@qds.biz
Web Site	www.qds.biz

Total Due	\$1,138.04
Payments/Credits	\$0.00
Balance Due	\$1,138.04

Cost Per Image Agreement



Supplier Name-Address:					
Owner: XEROX FINANCIAL SERVICES LLC - 201 Merritt 7, Norwalk, CT 06851				Agreement Number:	
CUSTOMER INFORMATION					
CUSTOMER	Full Legal Name: WATERFORD, TOWN OF				Phone:
	Billing Address: 15 Rope Ferry Road				Contact Name: Rawle Dummett
	City: WATERFORD	State: CT	Zip Code:	Contact Email: rdummett@waterfordct.org	
EQUIPMENT	QTY	MODEL and DESCRIPTION	MONTHLY IMAGE ALLOWANCE*		EXCESS IMAGE CHARGE**
			B&W		COLOR
	1	XEROX C8045	1,000		0
Meter Billing Frequency (Monthly unless checked): ☐ (Other)			* Included in Base Payment		** Plus applicable taxes
TERMS					
Initial Term: 63 (in months)		Base Payment (plus applicable taxes): \$158.00		Equipment Location (if different from Billing Address): 24 Rope Ferry Road	
Frequency: ☒ Monthly ☐ Quarterly ☐ Annually					
CUSTOMER ACCEPTANCE					
BY YOUR SIGNATURE BELOW, YOU ACKNOWLEDGE THAT YOU ARE ENTERING INTO A NON-CANCELLABLE AGREEMENT AND THAT YOU HAVE READ AND AGREED TO ALL APPLICABLE TERMS AND CONDITIONS SET FORTH ON PAGES 1 AND 2 HEREOF.					
Authorized Signer X: <i>[Signature]</i>			Date: <i>[Signature]</i>		Federal Tax ID # (Required): 06-2002121
Print Name: RAWLE DUMMETT			Title: PURCHASING AGENT		
OWNER ACCEPTANCE					
Accepted By: Xerox Financial Services LLC			Name and Title:		Date:
TERMS & CONDITIONS					

1. Definitions. The words "you" and "your" mean the legal entity identified in "Customer Information" above, and "XFS," "we," "us," "Owner" and "our" mean Xerox Financial Services LLC. "Party" means you or XFS, and "Parties" means both you and XFS. "Supplier" means the entity identified as "Supplier" above. "Acceptance Date" means the date you irrevocably determine Equipment has been delivered, installed and operating satisfactorily. "Agreement" means this Cost Per Image Agreement, including any attached Equipment schedule. "Commencement Date" will be a date after the Acceptance Date, as set forth in our first invoice, for facilitating an orderly transition and to provide a uniform billing cycle. "Discount Rate" means 3% per annum. "Equipment" means the items identified in "Equipment" above and in any attached Equipment schedule, plus any Software (defined in section 3 hereof), attachments, accessories, replacements, replacement parts, substitutions, additions and repairs thereto. "Excess Charges" means the applicable excess image charges. "Interim Period" means the period, if any, between the Acceptance Date and the Commencement Date. "Interim Payment" means one thirtieth of the Base Payment multiplied by the number of days in the Interim Period. "Payment" means the Base Payment specified above, which may include an amount payable to Supplier under the Maintenance Agreement to account for the Monthly Image Allowances listed above, the Excess Charges (unless otherwise agreed by you, Supplier and XFS), taxes and other charges you, Supplier and XFS agree will be invoiced by XFS. "Maintenance Agreement" means a separate agreement between you and Supplier for maintenance and support purposes. "Origination Fee" means a one-time fee of \$135 billed on your first invoice, which you agree to pay, covering origination, documentation, processing and other initial costs. "Term" means the Interim Period, if any, together with the Initial Term plus any subsequent renewal or extension terms. "UCC" means the Uniform Commercial Code of the State(s) where XFS must file UCC 1 financing statements to perfect its interest in the Equipment.

2. Agreement, Payments and Late Payments. You agree and represent that the Equipment was selected, configured and negotiated by you based on your judgment and supplied by Supplier. At your request, XFS will acquire same from Supplier to lease to you hereunder and you agree to lease same from XFS. The Initial Term commences on the Commencement Date. You agree to pay XFS the first Payment plus any applicable Interim Payment no later than 30 days after the Commencement Date; each subsequent Payment shall be payable on the same date of each month thereafter. You agree to pay us all sums due under each invoice via check, Automated Clearing House debit, Electronic Funds Transfer or direct debit from your bank account by the due date. If any Payment is not paid in full within 5 days after its due date, you will pay a late charge of the greater of 10% of the amount due or \$25, not to exceed the maximum amount permitted by law. For each dishonored or returned Payment, you will be assessed the applicable fee, not to exceed \$35. Restrictive covenants on any method of payment will be ineffective.

3. Equipment and Software. To the extent that the Equipment includes intangible property or associated services such as software licenses, such intangible property shall be referred to as "Software." You acknowledge and agree that XFS is not the licensor of such Software, and therefore has no right, title or interest in it and you will comply throughout the Term with any license and/or other agreement ("Software License") with the supplier of the Software ("Software Supplier"). You are responsible for determining with the Supplier whether any Software Licenses are required, and entering into them with the Software Supplier(s) no later than 30 days after the Acceptance Date. YOU AGREE THE EQUIPMENT IS FOR YOUR LAWFUL BUSINESS USE IN THE UNITED STATES, WILL NOT BE USED FOR PERSONAL, HOUSEHOLD OR FAMILY PURPOSES, AND IS NOT BEING ACQUIRED FOR RESALE. You will not attach the Equipment as a fixture to real estate or make any permanent alterations to it.

4. Non-Cancellable Agreement. THIS AGREEMENT CANNOT BE CANCELLED OR TERMINATED BY YOU PRIOR TO THE END OF THE INITIAL TERM. YOUR OBLIGATION TO MAKE ALL PAYMENTS IS ABSOLUTE AND UNCONDITIONAL AND NOT SUBJECT TO DELAY, REDUCTION, SET-OFF, DEFENSE, COUNTERCLAIM OR RECOURSE FOR ANY REASON WHATSOEVER, IRRESPECTIVE OF THE PERFORMANCE OF THE EQUIPMENT, SUPPLIER, ANY THIRD PARTY, OR XFS. Any purported claim by you against XFS for alleged breach of our obligations hereunder shall be asserted solely in a separate action; provided, however, that your obligations hereunder shall continue unabated.

5. End of Agreement Options. If you are not in default and if you provide no greater than 150 days and no less than 60 days' prior written notice to XFS, you may, at the end of the Initial Term or any renewal term ("End Date"), either (a) purchase all, but not less than all, of the Equipment by paying its fair market value, as determined by XFS in its sole but reasonable discretion ("Determined FMV"), plus Taxes, or (b) return the Equipment within 30 days of the End Date, at your expense, fully insured, to a continental US location XFS shall specify. You cannot return Equipment more than 30 days prior to the End Date without our consent. If we consent, we may charge you, in addition to all undiscounted amounts due hereunder, an early termination fee. If you have not elected one of the above options, this Agreement shall renew for successive 3-month terms. Either party may terminate the Agreement as of the end of any 3-month renewal term on 30 days' prior written notice and by taking one of the actions identified in (a) or (b) in the preceding sentence of this section. Purchase options shall be exercised with respect to each item of Equipment on the day immediately following the date of expiration of the Term of such item, and by the delivery at such time by you to XFS of payment, in form acceptable to XFS, of the amount of the applicable purchase price. Upon payment of the applicable amount, XFS shall transfer our interest in the Equipment to you on an "AS IS, WHERE IS," "WITH ALL FAULTS" basis, without representation or warranty of any kind.

6. Equipment Return. If the Equipment is returned to XFS, it shall be in the same condition as when delivered to you, except for "ordinary wear and tear" and, if not in such condition, you will be liable for all expenses XFS incurs to return the Equipment to such condition. IT IS SOLELY YOUR RESPONSIBILITY TO SECURE ANY SENSITIVE DATA AND PERMANENTLY DELETE SUCH DATA FROM THE INTERNAL MEDIA STORAGE PRIOR TO RETURNING THE EQUIPMENT TO XFS. YOU SHALL HOLD XFS HARMLESS FROM YOUR FAILURE TO SECURE AND PERMANENTLY DELETE ALL SUCH CUSTOMER DATA AS OUTLINED IN THIS SECTION.

7. Equipment Delivery and Maintenance. You should arrange with Supplier to have the Equipment delivered to you at the location(s) specified herein, and you agree to execute a Delivery & Acceptance Certificate at XFS's request (and confirm same via telephone and/or electronically) confirming when you have received, inspected and irrevocably accepted the Equipment, and authorize XFS to fund Supplier for the Equipment. If you fail to accept the Equipment, you shall no longer have a "y" obligations hereunder; however, you remain liable for any Equipment purchase order or other contract issued on your behalf directly with Supplier. Equipment may not be moved to another physical location without XFS's prior written consent, which shall not be unreasonably withheld or delayed. You agree that you will not take the Equipment out of service during the Term. You shall permit XFS or its agent to inspect Equipment and any maintenance records relating thereto during your normal business hours upon reasonable notice. You represent you have entered into a Maintenance Agreement to maintain the Equipment in good working order in accordance with the manufacturer's maintenance guidelines and to provide you with Equipment supplies. You acknowledge that XFS is acting solely as an administrator for Supplier with respect to the billing and collecting of the charges under any Maintenance Agreement. XFS IS NOT LIABLE FOR ANY BREACH BY SUPPLIER OF ANY OF ITS OBLIGATIONS TO YOU, NOR WILL ANY OF YOUR OBLIGATIONS HEREUNDER BE MODIFIED, RELEASED OR EXCUSED BY ANY ALLEGED BREACH BY SUPPLIER.



A Xerox Company

CONTRACT INVOICE

Invoice Number: IN1408058

Invoice Date: 04/20/2022

Bill To: TOWN OF WATERFORD
ASSESSORS OFFICE
15 ROPE FERRY ROAD
WATERFORD, CT 06385
USA

Customer: TOWN OF WATERFORD
15 ROPE FERRY ROAD
WATERFORD, CT 06385

Account No	Payment Terms	Due Date	Invoice Total	Balance Due	
T019	Net 30	05/20/2022	\$ 280.00	\$ 280.00	
Invoice Remarks					
Contract Number	Contact	Contract Amount	P.O. Number	Start Date	Exp. Date
CN18616-01	RAWLE DUMMETT	\$ 280.00		10/20/2020	01/19/2026
Contract Remarks					
COPIER ALLOWANCES : BLK-1000 CLR - 0 PER MONTH					

Summary:

Contract base rate charge for this billing period	\$0.00
Contract overage charge for the 10/20/2021 to 04/19/2022 overage period	\$220.00 **
Supply Freight	\$60.00
**See overage details below	\$280.00

Mail:**Equipment included under this contract****XER/XALC8045**

Number	Serial Number	Base Adj.	Location
AC7770	8TB627770	\$0.00	TOWN OF WATERFORD 15 ROPE FERRY ROAD WATERFORD, CT 06385 ASSESSORS DEPT

Meter Type	Meter Group	Begin Meter	End Meter	Credits	Total	Covered	Billable	Rate	Overage
BLK	BLK	66,202	85,546		19,344	6,000	13,344	\$0.006900	\$92.07
CLR	CLR	1,780	3,634		1,854	0	1,854	\$0.069000	\$127.93
									\$220.00

APPROVEDVENDOR# 842PO# FY 22CLOSE PO Y N XACCOUNT # 10104-52040AMOUNT \$280.00SIGN RAWDATE 5/6/22

Bill To:
Connecticut Business Systems
P.O. Box 936745
Atlanta, GA 31193-6745
800-842-0009

Invoice SubTotal	\$280.00
Tax:	\$0.00
Invoice Total	\$280.00
Balance Due:	\$280.00



A Xerox Company

CONTRACT INVOICE

Invoice Number: IN1526056

Invoice Date: 10/20/2022

Bill To: TOWN OF WATERFORD
FINANCE OFFICE
15 ROPE FERRY ROAD
WATERFORD, CT 06385
USA

Customer: TOWN OF WATERFORD
15 ROPE FERRY ROAD
WATERFORD, CT 06385

Account No	Payment Terms	Due Date	Invoice Total	Balance Due	
TO19	Net 30	11/19/2022	\$ 204.27	\$ 204.27	
Invoice Remarks					
Contract Number	Contact	Contract Amount	P.O. Number	Start Date	Exp. Date
CN18616-01	RAWLE DUMMETT	\$ 204.27		10/20/2020	01/19/2026
Contract Remarks					
COPIER ALLOWANCES : BLK-1000 CLR - 0 PER MONTH					

Summary:

Contract base rate charge for this billing period	\$0.00
Contract overage charge for the 04/20/2022 to 10/19/2022 overage period	\$144.27 **
Supply Freight	\$60.00
**See overage details below	\$204.27

Bill:

Equipment included under this contract**XER/XALC8045**

Number	Serial Number	Base Adj.	Location
AC7770	8TB627770	\$0.00	TOWN OF WATERFORD 15 ROPE FERRY ROAD WATERFORD, CT 06385 ASSESSORS DEPT

Meter Type	Meter Group	Begin Meter	End Meter	Credits	Total	Covered	Billable	Rate	Overage
BLK	BLK	85,546	97,795		12,249	6,000	6,249	\$0.006900	\$43.12
CLR	CLR	3,634	5,100		1,466	0	1,466	\$0.069000	\$101.15
									\$144.27

APPROVEDVENDOR# 842PO# FY 23CLOSE PO Y N XACCOUNT # 10104-52040AMOUNT 204.27SIGN Michael FebraDATE 11/3/22

REC'D FINANCE
OCT 24 '22 AM 11:41

Bill To:
Connecticut Business Systems
P.O Box 936745
Atlanta, GA 31193-6745
800-842-0009

Invoice SubTotal	\$204.27
Tax:	\$0.00
Invoice Total	\$204.27
Balance Due:	\$204.27

Connecticut Association of Assessing Officers
c/o Marsha Benno, Assessor's Office
11 Meetinghouse Lane
Woodbridge, CT 06525-1597

Membership Invoice

Invoice # 3078

December 6, 2022

Paige Walton
15 Rope Ferry Road
Waterford, CT 06385-2806

FILE COPY

Thank you for your membership! According to our records, your membership is about to expire. In order to continue your membership and all the benefits it provides, please send in payment before the Due Date below.

Thanks again and we hope you'll renew your membership in Connecticut Association of Assessing Officers!

MEMBER	ITEM	AMOUNT
Walton, Paige 1/1/2023 - 1/1/2024	Regular Member Membership Dues	70.00
APPROVED		
VENDOR# <u>69</u>		
PO# <u> </u> FY <u>2022</u>		
CLOSE PO Y <u> </u> N <u> </u>		
ACCOUNT # <u>10101-52050</u>		
AMOUNT <u>70.00</u>		TOTAL: 70.00

SIGN Paige Walton

DATE 12-8-2022

Payment Stub

Member: Walton, Paige

Invoice #: 3078
Description: Membership Dues
Date Due: 2/15/2023

Amt. Due: 70.00

Enclosed:

Please tear off this stub and include with your payment.
Send payment to:

CAAO
c/o Marsha Benno, Assessor's Office
1 Meetinghouse Lane
Woodbridge, CT 06525-1597

or login and pay online at
<https://caao.com>

GREATER NEW LONDON AREA ASSESSORS ASSOCIATION

2022 Membership Dues Notice

For April 1, 2022 through March 31, 2023

Name: Paige Walton

Municipality: Town of Waterford

Address: 15 Rope Ferry Rd.

City/State/ZIP Waterford, CT 06385

Phone Number: 860-444-5820

Email: pwalton@waterfordct.org

Dues are \$15.00

Make checks payable to GNLA

Please remit your payment with completed form to:

Kathi Race, Assessor's Office
Town of East Hampton
1 Community Dr
East Hampton, CT 06424-1000

****Please complete a separate form for each employee as necessary****

GREATER NEW LONDON AREA ASSESSORS ASSOCIATION

2022 Membership Dues Notice

For April 1, 2022 through March 31, 2023

Name: Nicole Serra

Municipality: Town of Waterford

Address: 15 Rope Ferry Rd.

City/State/ZIP Waterford, CT 06385

Phone Number: 860-444-5820

Email: nserra@waterfordct.org

Dues are \$15.00

Make checks payable to GNLA

Please remit your payment with completed form to:

Kathi Race, Assessor's Office
Town of East Hampton
1 Community Dr
East Hampton, CT 06424-1000

****Please complete a separate form for each employee as necessary****

Connecticut Association of Assessing Officers
c/o Marsha Benno, Assessor's Office
11 Meetinghouse Lane
Woodbridge, CT 06525-1597

Membership Invoice

APPROVED

Invoice # 2525

VENDOR# 109
PO# FY 22
CLOSE PO Y N
ACCOUNT # 10104-52050
AMOUNT 70.00
SIGN PW
DATE 2/16/22

Nicole Serra
Waterford Town Hall
15 Rope Ferry Rd
Waterford, CT 06385-2806

Thank you for your membership! According to our records, your membership is about to expire. In order to continue your membership and all the benefits it provides, please send in payment before the Due Date below.

Thanks again and we hope you'll renew your membership in Connecticut Association of Assessing Officers!

MEMBER	ITEM	AMOUNT
Serra, Nicole 1/1/2022 - 1/1/2023	Regular Member Membership Dues	70.00
TOTAL:		70.00

Payment Stub

Member: Serra, Nicole

Please tear off this stub and include with your payment.
Send payment to:

Invoice #: 2525
Description: Membership Dues
Date Due: 2/15/2022

CAAO
c/o Marsha Benno, Assessor's Office
11 Meetinghouse Lane
Woodbridge, CT 06525-1597

Amt. Due: 70.00

Enclosed:

or login and pay online at
<https://caao.com>

Connecticut Association of Assessing Officers
c/o Marsha Benno, Assessor's Office
11 Meetinghouse Lane
Woodbridge, CT 06525

Membership Invoice

Invoice # 2560

APPROVED

VENDOR# 69

PO# FY 22

CLOSE PO Y N

ACCOUNT # 10104-52050

AMOUNT 70.00

SIGN PW

DATE 12-20-21

Paige Walton
15 Rope Ferry Road
Waterford, CT 06385-2806

Thank you for your membership! According to our records, your membership is about to expire. In order to continue your membership and all the benefits it provides, please send in payment before the Due Date below.

Thanks again and we hope you'll renew your membership in Connecticut Association of Assessing Officers!

MEMBER	ITEM	AMOUNT
Walton, Paige 1/1/2022 - 1/1/2023	Regular Member Membership Dues	70.00
		TOTAL: 70.00

Payment Stub

Member: Walton, Paige

Invoice #: 2560

Description: Membership Dues

Date Due: 2/15/2022

Amt. Due: 70.00

Enclosed:

Please tear off this stub and include with your payment.
Send payment to:

CAAO
c/o Marsha Benno, Assessor's Office
11 Meetinghouse Lane
Woodbridge, CT 06525

or login and pay online at
<https://caao.com>



INTERNATIONAL ASSOCIATION

OF ASSESSING OFFICERS

Paige S. Walton
Town of Waterford
15 Rope Ferry Rd
Waterford, CT 06385-2806

Membership Dues

SECOND NOTICE

Please return with payment on or before due date
to ensure your membership does not lapse.

IAAO

314 W 10th St
Kansas City, MO 64105-1616 USA
Telephone 816/701-8100
Toll Free 800/616-4226
Fax 816/701-8149
Internet www.iaao.org
Federal ID No. 36-2210012

	Begin Date	End Date	Amount Due
Regular Membership for Paige S. Walton (Regular)	1/1/22	12/31/22	\$225.00
Fair and Equitable	1/1/22	12/31/22	\$0.00
Journal of Property Assessment and Administration	1/1/22	12/31/22	\$0.00

APPROVED

VENDOR# ~~111579~~ 223

— FY 2022

E PO Y N

ACCOUNT # 10104-62050

AMOUNT 225.00

TOTAL DUE: 225.00

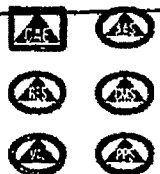
You have been a member since 1997, 2007.

Mailing Address:

Paige S. Walton
Town of Waterford
15 Rope Ferry Rd
Waterford, CT 06385-2806

SIGN
DATE 12/13/22

IAAO offers six professional designations increasing competence of assessment personnel through education:



Certified Assessment Evaluator
Assessment Administration Specialist
Cadastral Mapping specialist
Personal Property Specialist
Residential Evaluation Specialist
Mass Appraisal Specialist
Please contact designations@iaao.org for more information.

Please return form with payment to:

IAAO
PO Box 29900 Dept. 929
Phoenix, AZ 85038-0900

Credit card payments may be faxed to 1-816-701-8149.

CARD NUMBER	VISA	EXPIRATION
NAME ON CARD		CVV/CID

SIGNATURE

Pay online anytime at www.iaao.org!

Member Number: 00144399
Invoice Number: 22-00144399
Amount Due: 225.00
Due Date: Past Due

CHECK OR CREDIT CARD ONLY

*Make checks payable to IAAO in U.S. \$ currency.

If you would like to make a change to this invoice, please call the IAAO
Membership Department at 1-800-616-4226.

The provided e-mail is for the servicing of your account. It is IAAO Policy not to sell, rent, or distribute e-mail addresses.
Questions or Concerns? Please call the IAAO Membership Department at 1-800-616-4226

Northeastern Regional Association of Assessing Officers

An Affiliate of the International Association of Assessing Officers

2021 Membership Application

Dear Assessing/Appraising Professional,

Below is an application to renew your membership to the Northeastern Regional Association of Assessing Officers. Our organization has been in existence for over fifty years and was created to provide training and educational opportunities for assessing officials, to improve assessment standards and to promote more efficient and uniform administration of property tax laws throughout the northeastern United States and Canada.

In order to reach the above goals, the NRAAO sponsors an annual conference. This year the conference was to be held at The Hard Rock Hotel & Casino Atlantic City, New Jersey MAY 17-20, 2020. Due to COVID 19 the conference was forced to be cancelled. Hats off to New Jersey for being able to recover all funds spent and refund any money to any participant who had already paid. They were very disappointed at the cancellation of their conference but at our annual fall meeting of our Board of Directors they have stepped up and will try it again in 2025. **Thank you New Jersey!!!**

Also at our Board of Directors meeting, New Hampshire, who was to be our host for our 2021 conference has now decided, due to on-going COVID 19 issues, that they are working on a **VIRTUAL** conference, more information to follow. **PLEASE** keep your membership **CURRENT**. It is important during these uncertain times that we have a network of professionals in the appraising/assessing field that could help you to gain insight to how the assessment field operates, learn about new laws and regulations and contact other assessing officials from various communities, states and provinces.

Vendor #

VEN Please fill out the application and send it along with the proper fee, via check, money order or voucher made out to NRAAO and return it to Betsy Quist, P.O. Box 5005, Woodbridge, CT 06525.

PO# Y 2022 OR PAY ONLINE - NRAAO.ORG (fees apply)

The fee structure is as follows:

CLOSE PO	Y	NY
ACCOUNT #	1904-52050	
Amount	\$40	
	12/13/2021	

Active Member (Assessing Officials):	\$40.00
Associate Member (Retired Officials):	\$15.00
Subscribing Members (Corporate, Reps, etc):	\$100.00

RENEWAL MEMBERSHIP APPLICATION 2021

NORTHEASTERN REGIONAL ASSOCIATION OF ASSESSING OFFICERS

Name: Patty Walton Title: Assessor Date: 12/8/21
Jurisdiction/Firm: Town of Watford Phone Number: (860) 444-5820
Mailing Address: 15 Rope Ferry Rd City: Watford ST: CT Zip: 06385
Fax Number: (860) 444-5819 E-Mail Address: pwalton@watfordct.org

Signature [Signature]

Complete this application and return it with the appropriate fee by check, voucher or money order made out to NRAAO and return to NRAAO, c/o Betsy Quist, P.O. Box 5005, Woodbridge, CT 06525-5005. If you have any questions, please do not hesitate to call 860-444-5820.

APPROVED

VENDOR# 223

PO# - FY 22

CLOSE PO Y N

ACCOUNT # 10104-52050

AMOUNT \$ 69.57

SIGN PW

DATE 5/24/22

~~MAY 24~~, 2022

ORDER # 77294

314 W 10th St, Kansas City, MO 64105

BILL TO

Paige S. Walton
Town of Waterford
15 Rope Ferry Rd
Waterford, CT 06385-2806
8608578303
Customer ID 00144399

SHIP TO

Paige Walton
Town of Waterford -
Assessor's Office
15 Rope Ferry Rd
Waterford, CT 06385-2806
(860) 857-8303

Please send
reimbursement to:

Paige Walton
2432 Dairy Rd.
Cosby, TN 37722

QTY	ITEM #	DESCRIPTION	UNIT PRICE	TOTAL
1	BK0097	Property Assessment Valuation - Third Ed.	\$50.00	\$50.00
			Subtotal: (US\$)	\$50.00
			Freight:	\$16.31
			Handling:	\$3.26
			Total: (US\$)	\$69.57
			Payment: (05/24/2022 - card ending: 5094)	(\$69.57)
			Amount Due	\$0.00

Click on MY ACCOUNT to access your online courses, e-books, previous webinars and proceeding recordings, past order information, and membership information.

If the receipt does not display correctly Click here to open in a browser.

Handbooks ordered during the registration process can be picked up at the registration desk on Sunday, June 5 in the lobby of the Graduate Storrs Hotel or in class on Monday, June 6.

Those wishing to purchase a Handbook onsite may do so with a check made out to "CAAO".

CCMA 1B, 2A, 2B, 3, and 4 (Revaluation Course)

- Property Assessment Valuation, 3rd Edition

* **Students must purchase this required text directly from the IAAO website.**

It is recommended that students enrolled in CCMA courses 1B, 2A, 2B, 3, and 4 (Revaluation Course) complete assigned readings (provided by course instructors) from the IAAO text *Property Assessment Valuation, 3rd Edition* prior to the start of School. The prerequisite reading list is posted on the CAAO website.

CCMA 3 - Additional optional texts

Please check the CAAO website for optional texts available for purchase through the Appraisal Institute.

For CAAO Advanced Workshop Participants:

Credit Hours:

Anyone arriving after 9:00 AM to a morning workshop or 1:30 PM to an afternoon workshop will not receive credit hours. **No exceptions.**

Monday - Thursday morning and afternoon sessions: 3.25 hours of credit each.
Friday morning session: 3.0 hours of credit.

Credit hours have been approved by the CCMA based on the time frame set forth by the workshop schedule and reflect the actual number of contact hours that each workshop is in session.

To receive credit for the workshop hours attended, sign-in/out requirements must be met for each workshop held.

For all participants and instructors:

Parking Information:

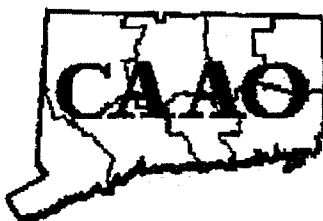
Paige Walton

Duplicate copy

From: University Events and Conference Services <conferences@uconn.edu>
Sent: Wednesday, April 13, 2022 2:59 PM
To: Paige Walton
Subject: Registration Confirmed - 79th Annual School of Connecticut Assessors and Board of Assessment Appeals

CAUTION: This email originated from outside of the organization.

Do not click links or open attachments unless you recognize the sender's email address and know the content is safe.



Reimbursement
Sent to Paige

Dear Paige,

Your registration has been confirmed. Please save this email for future reference.

Event: 79th Annual School of Connecticut Assessors and Board of Assessment Appeals

Attending: Paige Walton

Number in Party: 1

Time: 4:00 PM

Date: June 5, 2022

Confirmation Number: KRNKQLWL47R

For CCMA Course Participants:

What to Bring:

Individuals enrolled in CCMA 2A should bring a 3-ring binder for handout materials. Participants in all courses, especially CCMA 3, are encouraged to

Yes

Sessions

06-Jun-2022

9:00 AM - 12:15 PM

Valuation of Affordable Housing &
Accessory Dwelling Units

07-Jun-2022

9:00 AM - 12:15 PM

Aquaculture vs. Maritime Heritage
Land

1:30 PM - 4:45 PM

R.E. & P.P. - Solar, Batteries & Wind
Turbine

08-Jun-2022

9:00 AM - 4:45 PM

Revaluation A - Z

10-Jun-2022

12:15 PM - 1:30 PM

Lunch

[View or modify your registration](#)

We look forward to seeing you there.



Sincerely,

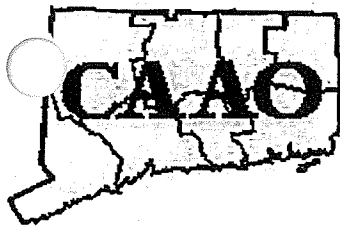
University Events and Conference Services

conferences@uconn.edu

If you no longer want to receive emails from University Events and Conference Services, please [Opt-Out](#).

CAAO Advanced Workshops - Three Day Pass

\$300.00



APPROVED

VENDOR# 69

PO# — FY 22

Summary Fees Agenda at a Glance Sessions Speakers
Required Texts Hotel Directions and Parking Contact Us

CLOSE PO Y N

ACCOUNT # 10104-52050

AMOUNT 450.00

SIGN PW

DATE 4/13/22

79th Annual School of Connecticut Assessors and Board of Assessment Appeals

June 5, 2022—June
10, 2022

UConn
Thomas J. Dodd Research
Center
Storrs, CT 06269

Order Summary

Review your order information and submit your payment.

Nicole Serra

Admission Item

CCMA Course 1B

\$450.00

er your discount code (if applicable)

Apply

Subtotal \$450.00

Order Total \$450.00

Payment

Select Payment Method

☐ Credit Card

☐ Check

☒ Purchase Order

Total Due \$450.00

Purchase orders should be made out to: University of Connecticut – Assessors 22.

They may be mailed to the address below, emailed to conferences@uconn.edu, or faxed to (860) 486-1064.

Please include:

- purchase order number
- maximum amount of purchase order
- valid start and end dates
- contact information of the person responsible for payment of purchase order
- the names of the attendees the PO covers

P.O.s should be mailed to:

UConn Events and Conference Services

Attn: Assessors 22

2019 Hillside Road, Unit 1185

Storrs, CT 06269-1185

Purchase Order Name/Number

Nicole Serra

From: Paige Walton
Sent: Monday, October 31, 2022 1:58 PM
To: Nicole Serra
Subject: FW: JD Power Pricing Schedule for 2022 & 2023 Budget
Attachments: NADA MV Pricing Scenario - 2022 - Final.xlsx; J.D. Power Guide Book Pricing 2022.xlsx

Here are the prices for next year

From: Labarbera, Larry <labarbera@townofwindsorct.com>
Sent: Thursday, December 16, 2021 2:46 PM
To: CAAO Hotline (caao-hotline@caao.com) <caao-hotline@caao.com>
Subject: JD Power Pricing Schedule for 2022 & 2023 Budget

CAUTION: This email originated from outside of the organization.

Do not click links or open attachments unless you recognize the sender's email address and know the content is safe.

Assessor,

As many of you are aware, JD Power (formerly NADA) is changing the base pricing to a per vehicle price. The base price for your town (shown on the spreadsheet in blue) has not changed for many years. In addition, this included one set of pricing guides.

For 2022 the price will be \$0.055 per vehicle. In addition, all of the guides must be purchased separately (price list attached). We understand that most of you have not budgeted this amount in your current FY 22 budgets. However, this will be the basis for the order form and the invoice you will receive from CAAO in the spring of 2022. The column highlighted in yellow is your new base price. Purchasing one of each guide (not including the online guides) will add \$433 to your base price. The additional \$75 per town is so we can provide the Truck & Trailer VIN program, the NICB guide, the Motor Vehicle committee expenses and one set of books provided to OPM.

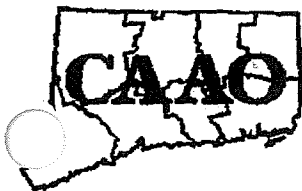
The Chairs of the Motor Vehicle Committee worked very hard to mitigate this increase. It was only a couple of months ago that a final resolution was reached. JD Power wanted a much higher increase for 2022. As it is, for 2023 the per vehicle price will be \$0.077 and the pricing guides are expected to increase another 15% (your 2023 base price is shown in the last column). Remember to add the guide costs when requesting your FY 23 budget amounts.

Larry.

Lawrence LaBarbera, ASA, CCMA II, CCMC
Assessor, Town of Windsor
(860) 285-1819

Town Name	Town Code	County	# of MV's	Base Price 2021	2021 Total incl. Additional Books	PER VEH @.055	2022 Base Price \$0.055 per vehicle (rounded to nearest \$100) + \$75/town	2023 Base Price \$0.077 per vehicle (rounded to nearest \$100) + \$75/town
Wallingford	148	New Haven County	44,038	\$ 730.00	\$ 1,076.00	\$ 2,422.09	\$ 2,475.00	\$ 3,475.00
Warren	149	Litchfield County	1,735	\$ 350.00	\$ 425.00	\$ 95.43	\$ 175.00	\$ 175.00
Washington	150	Litchfield County	4,504	\$ 350.00	\$ 453.00	\$ 247.72	\$ 275.00	\$ 375.00
Waterbury	151	New Haven County	68,499	\$ 730.00	\$ 1,024.00	\$ 3,767.45	\$ 3,875.00	\$ 5,375.00
Waterford	152	New London	20,592	\$ 470.00	\$ 470.00	\$ 1,132.56	\$ 1,175.00	\$ 1,675.00
Watertown	153	Litchfield County	22,333	\$ 470.00	\$ 470.00	\$ 1,228.32	\$ 1,275.00	\$ 1,775.00
Westbrook	154	Middlesex County	7,940	\$ 350.00	\$ 413.00	\$ 436.70	\$ 475.00	\$ 675.00
West Hartford	155	Hartford County	46,912	\$ 730.00	\$ 793.00	\$ 2,580.16	\$ 2,675.00	\$ 3,675.00
West Haven	156	New Haven County	38,170	\$ 600.00	\$ 1,049.00	\$ 2,099.35	\$ 2,175.00	\$ 2,975.00
Weston	157	Fairfield County	8,464	\$ 350.00	\$ 350.00	\$ 465.52	\$ 575.00	\$ 775.00
Westport	158	Fairfield County	23,545	\$ 470.00	\$ 545.00	\$ 1,294.98	\$ 1,375.00	\$ 1,875.00
Wethersfield	159	Hartford County	23,019	\$ 470.00	\$ 723.00	\$ 1,266.05	\$ 1,375.00	\$ 1,875.00
Willington	160	Tolland County	6,730	\$ 350.00	\$ 540.00	\$ 370.15	\$ 475.00	\$ 575.00
Wilton	161	Fairfield County	15,959	\$ 470.00	\$ 781.00	\$ 877.75	\$ 975.00	\$ 1,275.00
Winchester	162	Litchfield County	10,512	\$ 470.00	\$ 510.00	\$ 578.16	\$ 675.00	\$ 875.00
Windham	163	Windham County	16,793	\$ 470.00	\$ 608.00	\$ 923.62	\$ 975.00	\$ 1,375.00
Windsor	164	Hartford County	27,480	\$ 600.00	\$ 738.00	\$ 1,511.40	\$ 1,575.00	\$ 2,175.00
Windsor Locks	165	Hartford County	22,452	\$ 470.00	\$ 470.00	\$ 1,234.86	\$ 1,275.00	\$ 1,775.00
Wolcott	166	New Haven County	16,951	\$ 470.00	\$ 919.00	\$ 932.31	\$ 975.00	\$ 1,375.00
Woodbridge	167	New Haven County	8,275	\$ 350.00	\$ 540.00	\$ 455.13	\$ 575.00	\$ 675.00
Woodbury	168	Litchfield County	10,703	\$ 470.00	\$ 781.00	\$ 588.67	\$ 675.00	\$ 875.00
Woodstock	169	Windham County	9,398	\$ 350.00	\$ 453.00	\$ 516.89	\$ 575.00	\$ 775.00
			3,039,215			\$ -		\$ -
					\$ 107,708.00	\$ 167,156.83	\$ 180,175.00	\$ 246,475.00
						JD Power	\$ 165,000.00	
						NICB	\$ 1,700.00	
						Truck VIN	\$ 4,000.00	
							\$ 170,700.00	

Guide Description	2022 Pricing
Used Car Guide	\$70.00
Older Used Car Guide	\$55.00
Classic, Collectible & Exotic Guide	\$55.00
Commercial Truck Guide	\$70.00
Motorcycle/Snowmobile Guide	\$55.00
Vintage Collectible & Retro Motorcycle	\$50.00
Recreational Vehicle Guide	\$78.00
CONNECT RV - Older RV's Online Only	\$130.00
JD Power Online Program	\$184.00



CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS

MOTOR VEHICLE COMMITTEE

SUBSCRIPTION RENEWAL PACKAGE

2022 NADA MOTOR VEHICLE PRICING PACKAGE

Wednesday, May 11, 2022

Waterford Assessor's Office
Town Hall
15 Rope Ferry Road
Waterford CT 06385-2806

1 2022 NADA MOTOR VEHICLE PRICING PACKAGE \$ 1,175

All Guide Books are now purchased separately.

ADD Total Amount figure from "ADDITIONAL J.D. POWER" form \$ 250

TOTAL AMOUNT DUE TO CAAO, INC \$ 1,425 -

MAKE CHECK PAYABLE TO CAAO, INC

MAIL ALL ORDER FORMS & PAYMENTS TO:
APPROVED

Sandy Rainieri
City of Milford
Assessor's Office
70 West River St
Milford, CT 06460

VENDOR# 69

PO# FY 2022

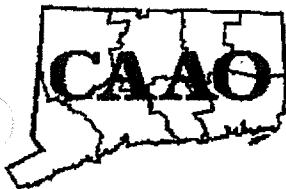
CLOSE PO Y N X

ACCOUNT # 10104-53200

AMOUNT \$1425

SIGN PW

DATE 5/16/22



CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS
MOTOR VEHICLE COMMITTEE

ORDER FORM – “ADDITIONAL J.D. POWER” 2022 PRICING GUIDES

TOWN OF: Waterford Assessor's Office
Town Hall
15 Rope Ferry Road
Waterford, CT 06385-2806

QTY

# _____	October issue, J.D. POWER Official Used Car Guide	\$ 70.00 ea. _____
# _____	Sept-Dec issue, J.D. POWER Official Older Used Car Guide	\$ 55.00 ea. _____
# _____	Sept-Dec issue, J.D. POWER Classic, Collectible, Exotic Guide	\$ 55.00 ea. _____
# _____	Sept-Dec issue, J.D. POWER Commercial Truck Guide	\$ 70.00 ea. _____
# _____	Sept-Dec issue, J.D. POWER Motorcycle/Snowmobile Guide	\$ 55.00 ea. _____
# _____	Dec. issue, J.D. POWER Vintage Collectible & Retro Motorcycle	\$ 50.00 ea. _____
# _____	Sept-Dec issue, J.D. POWER Recreational Vehicle Guide	\$ 78.00 ea. _____
# _____	J.D. POWER CONNECT RV * <u>Online Subscription Only</u> *(replaces Older RV Guide) has values for both RV Guides (years 2022-1968)	\$130.00 ea. _____
# <u>1</u>	J.D. POWER Online (replaces E-Valuator)	\$250.00 ea. <u>✓</u>

_____ **TOTAL ORDER**

TOTAL AMOUNT \$ 250.00
(Add this amount to the billing form)

MAKE CHECK PAYABLE TO:

CAAO, INC

MAIL ALL ORDER FORMS & PAYMENTS TO:

Sandy Rainieri
City of Milford
Assessor's Office
70 West River St
Milford, CT 06460

Paige Walton

From: Paige Walton
Sent: Tuesday, May 17, 2022 11:09 AM
To: Kimberly Allen
Cc: Christy Gregg; Nicole Serra
Subject: Assessor budget
Attachments: 4TH QTR IN-SERIES TRANSFER REQUEST.xls; NADA pricing.pdf

Attached please find a 4TH quarter in-series transfer request for the Assessor's office to cover both the postage and service contract line items.

As well I wanted to bring to your attention a recent sizable increase in the cost for our NADA (now JD Powers) pricing books. Historically the base price for a standard set of NADA motor vehicle pricing books has always been around \$500 per year. The base price included not only the books but also the fee for the DMV to automatically price the majority of vehicles using the NADA software prior to the list being released to us.

We were informed in December that the JD Powers pricing will be changing. The base price for DMV pricing through the new software is now calculated on a per vehicle price (.055 per car) and physical pricing books are no longer included with the base price but instead will be available on an a la carte basis. Rather than spend the additional \$433 on physical books we have tested the online access to JD powers, and have opted to instead utilize the online subscription service for \$250 per year to price those vehicles that appear on our unpriced list or that are added to the Grand List after the fact.

The result is a total NADA/JD Powers pricing fee of \$1,425 this year, an increase of \$925 which had not been budgeted for. Since there does not appear to be any excess funds that can be transferred, how should we proceed in order to ensure that the the attached MV pricing invoice is paid?

Thanks,

Paige

Paige S. Walton, CCMA II
Assessor
Town of Waterford
(860) 444-5822
pw Walton@waterfordct.org

**TOWN OF WATERFORD
PROPOSED REVENUE BY DEPARTMENT
GENERAL FUND
2023-2024 FISCAL YEAR**

All revenues from each department must be listed in the following categories. Please add any revenue lines that are not listed below.

DEPARTMENT: ASSESSOR

LINE ITEM	2020-2021 ACTUAL	2021-2022 ACTUAL	2022-2023 YTD	2023-2024 PROPOSED	VARIANCE
Alarm Monitoring					0
Alarm Penalties					0
Ambulance Subsidy					0
Beach Admission Fees					0
Benefit Assessments					0
Bulky Waste Fees					0
Conveyance Tax					0
Copy Fees	273	460	190	380	191
East Lyme Animal Control Fee					0
Enhanced E 9-1-1					0
Fines/Penalties					0
Hazardous Household Waste					0
Inspection Fees					0
Interest/Lien Fees					0
Inter-Municipal Revenues					0
Miscellaneous					0
Permitting/Licensing Fees					0
Program/Registration Fees					0
Recording Fees					0
Regional Communications Fees					0
Rentals					0
Sale of Recyclables					0
State Operational Grants					0
Tipping Fees					0
Versa Kart/Blue Box Purchases					0
					0
					0
					0
					0
					0
TOTALS	273	460	190	380	191