

TOWN OF WATERFORD
GENERAL FUND
2025-2026 PROPOSED BUDGET

DEPT/AGENCY:

10104

ASSESSOR

LINE ITEM	DESCRIPTION	2023-2024 ACTUAL EXPENDED	2024-2025 RTM APPROP.	2024-2025 ADDITIONAL/ TRANSFERS	ACTUAL EXPEND & ENCUMB AS OF 1/1/25	2025-2026 DEPT/ AGENCY REQUEST	2025-2026 BD OF SELECTMEN APPROVED	2025-2026 BOARD OF FINANCE APPROVED	BOF Approved \$ Increase	BOF Approved % Increase
PERSONNEL COSTS										
51110	ADMINISTRATION	200,976	206,793		106,962	211,963	211,963	211,963	5,170	2.50%
51210	CLERICAL/TECHNICAL	64,594	45,797		22,554	46,899	46,899	46,899	1,102	2.41%
51910	FRINGE BENEFITS	0	250	25	275	250	250	250	0	100.00%
51920	F.I.C.A	19,766	19,343		9,702	19,803	19,803	19,803	460	2.38%
	SUBTOTAL	285,336	272,183	25	139,493	278,915	278,915	278,915	6,732	2.47%
SERVICES										
52010	ADVERTISING	232	300		198	300	300	300	0	0.00%
52020	POSTAGE	1,445	1,720		482	1,860	1,860	1,860	140	8.14%
52030	PROFESSIONAL FEES	205	250	24,500	24,750	24,750	24,750	24,750	0	0.00%
52040	SERVICE CONT & REPAIRS	7,339	6,350		3,330	7,662	7,662	7,662	1,312	20.66%
52050	DUES, CONF., & EDUCATION	3,006	3,290		580	2,765	2,765	2,765	-525	-15.96%
52070	REIMBURSABLE EXPENSE		0		0	1,364	1,364	1,364	1,364	0.00%
	SUBTOTAL	12,227	11,910	24,500	29,340	38,701	38,701	38,701	26,791	224.95%
MATERIALS & SUPPLIES										
53020	OTHER SUPPLIES	138	750	(25)	310	835	835	835	85	11.33%
53200	PRICING BOOKS	0	2,370		1,190	1,190	1,190	1,190	-1,180	-49.79%
	SUBTOTAL	138	3,120	(25)	1,500	2,025	2,025	2,025	-1,095	-35.10%
	DEPARTMENT TOTAL	297,701	287,213	24,500	170,333	319,641	319,641	319,641	32,428	11.29%

TOWN OF WATERFORD
FY2026 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, alteration, parcel and map changes resulting from sub-division, assemblage, boundary agreements and surveys filed as of the assessment date.

In compiling the annual Grand List the Assessor's office regularly reviews and inspects ongoing improvements made to real property, processes approximately 1300 business personal property filings annually, and lists and values all vehicles located within the Town of Waterford as of the October 1st assessment date.

The Assessor's office also provides technical and clerical assistance to the Board of Assessment Appeals throughout the year by creating the Board's hearing schedules, generating appointment letters and notices and recording required agendas and minutes.

Throughout the year the Assessor engages in ongoing appraisal review and analysis; prepares written and oral testimony and works in collaboration with the Town's legal department to resolve any outstanding tax appeals filed with Superior Court under CGS §12-117a and 12-119.

In accordance with Connecticut statutes, The Assessor's office must also oversee the periodic revaluation of all real property within the Town of Waterford. Effective with the 2023 Grand List, Section 7 of Public Act 22-74, five revaluation zones have been established and a new five-year revaluation schedule has been instituted statewide. This legislation redistributes the number of revaluations to be performed annually, and results in an accelerated schedule for the Town of Waterford. Mandatory revaluations are now scheduled for Grand List years 2026, 2029 and 2034.

Looking Ahead: Staffing levels are expected to remain consistent over the next five years with three full-time positions and the possible addition of a student intern to provide assistance on a part-time seasonal basis as we complete the next two scheduled revaluations. Outside of the three state-mandated revaluations scheduled between the years 2026 and 2034 there are no additional capital project requests anticipated.

**TOWN OF WATERFORD
FY2026 BUDGET REQUEST
DEPARTMENT:**



Assessor's Office Metrics

<u>ACTIVITY</u>	<u>#</u>
Real Estate	
Changes to real property ownership	850
Building permits entered/processed	2280
Property inspections/construction detail/value changes	586
Motor Vehicles	
# of vehicles manually priced	5807
certificates of correction to prorate/add or delete vehicles from current and prior GLs	1414
Personal Property	
# accounts reconciled/priced	1262
Assessment Administration	
State Elderly tax relief applications processed	106
Local Elderly tax relief applications processed	106
State Additional Veterans applications processed	71
Local Veterans applications processed	108
New Veteran's Totally & Permanently Disabled applications processed	63
Board of Assessment Appeals applicants scheduled 23 RE & MV	40
BAA Changes made	18
Map Changes processed	46
Tax Appeals received	29
Tax Appeals currently under review	11
Income & Expense forms rec'd/analyzed	191
New PA490 apps reviewed	4
PA490 Decertifications	3
Veterans- new DD214s recorded	48

TOWN OF WATERFORD
FY2026 BUDGET REQUEST
DEPARTMENT:



Budget Summary

Line Item	FY 2021	FY 2022	FY 2023	FY 2024	FY 2025	FY 2026	Change from FY 2025 (+/-)
	Appropriated	Appropriated	Appropriated	Appropriated	Appropriated	Request	
PERSONNEL COSTS							
51110 Administration	196,788	196,788	169,295	192,597	206,793	211,963	5,170
51210 Clerical/Technical	58,818	62,788	62,224	66,342	45,797	46,899	1,102
51810 Overtime	0	0	0	0	0	0	0
51910 Fringe Benefits	2697	2408	0	0	250	250	0
51920 FICA	19,761	20,041	17,711	19,809	19,343	19,803	460
SUBTOTAL	278,064	282,025	249,230	278,748	272,183	278,915	6,732
SERVICES							
52010 Advertising	650	400	400	400	300	300	0
52020 Postage	744	1031	1068	1650	1720	1860	140
52030 Professional Fees	0	250	250	250	250	24750	24500
52040 Serv Cont & Repairs	1680	5666	5921	6236	6350	7662	1312
52050 Dues, Conf. & Education	1825	1825	1825	2855	3290	2765	-525
52070 Reimbursable Expense	0	0	0	0	0	1364	1364
SUBTOTAL	4,899	9,172	9,464	11,391	11,910	38,701	26,791
MATERIALS & SUPPLIES							
53020 Other Supplies	150	150	150	150	750	835	85
53200 Pricing Books	500	500	500	1859	2370	1190	-1180
SUBTOTAL	650	650	650	2,009	3,120	2,025	(1,095)
DEPARTMENT TOTAL	283,613	291,847	259,344	292,148	287,213	319,641	32,428

**TOWN OF WATERFORD
FY2026 BUDGET REQUEST
DEPARTMENT:**



Budget Explanations By Category

Personnel Costs: Office staff consists of three full time positions; a Certified Municipal Assessor, an Assistant Assessor and an Assessor's Aide III. Salaries, fringe benefits & longevity are based on rates established by union contracts.

Budget Request: **\$278,915**

2.47% 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 the Assessor's ongoing continuing education, Assistant Assessor's required certification courses and staff training.

Budget Request:

- **10104-52010 – Advertising** Request: **\$300** **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. The required notice is published in *The Day* newspaper and posted on the Town's website. The combined legal ad published in the fall is advertised jointly with three neighboring municipalities resulting in a cost-sharing discount. An additional notice announcing the filing requirements for the state Elderly Homeowners/Totally Disabled tax relief program is posted in February on the Town's website, in the senior center and on the Waterford Community Access TV Channel. The Assessor's office also conducts periodic forums for residents to provide information and updates regarding available tax benefit programs effecting senior citizens and veterans.

TOWN OF WATERFORD

FY2026 BUDGET REQUEST

DEPARTMENT:



- **10104-52020 – Postage** Request: **\$1,860** **8.14% increase**

In addition to typical correspondence with taxpayers, the Assessor's Office is required by CT State Statutes 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

Personal property audit notification and results letters

Postage costs incurred in FY24/25 to date = \$482.06

Postage Breakdown:

	Postage Items	Postage Fees
I&E Penalty Notices	32	
Increase Notices PP	1270	
RE	478	
PP Audit Notices Certified	26	
PP Audit Result Notices Certified	26	
PP Audit 2nd request for documentation	8	
Elderly Letters	111	
Elderly Reminders	39	
Eld Cert of Mailing	39	\$ 19.50
Advets & Local Vets	78	
Certified Mail Pieces	52	\$ 252.20
Regular Mail Pieces	2055	\$ 1,500.15
Estimated additional 15 pieces of mail per month May-Dec (General Taxpayer correspondence)	120	\$ 87.60
Estimated FY25-26	2227	\$ 1,859.45

TOWN OF WATERFORD

FY2026 BUDGET REQUEST

DEPARTMENT:



- 10104-52030 – Professional Fees** Request: **\$24,750**

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.

Last year the Assessor's office implemented a personal property audit program which includes the physical inspection of business personal property and records by an experienced auditor well-versed in personal property valuation. Personal property auditing services are currently provided by Charles B. Feldman & Associates LLC.

Of the existing 1261 personal property accounts roughly 1/3 (440) accounts did not file a personal property declaration form for the 2024 Grand List. While desk audits are performed in-house through the declaration reconciliation process, non-filer and complex accounts warrant an in-depth 3-year lookback audit to ensure filing compliance and to establish an equitable base value for these accounts moving forward.

Based on the current rates by account size provided below the cost to formally audit 20 accounts, including two large utility accounts for the 2022 – 2024 Grand List years is \$24,500.

		22,23,24 Grand List Audits	
<u>Pre-Adjusted Gross Assessment</u>	<u>Cost to Complete</u>	<u>Anticipated # Accounts</u>	
1.01 million - 2.5 million	\$ 2,000		
2.51 million - 5.0 million	\$ 3,000		
5.01 million - 10 million	\$ 4,000		
10.01 million - 20 million	\$ 5,500	1	\$ 5,500.00
20 million plus	\$ 6,000 plus	1	\$ 7,300.00
1.0 million and under	\$ 650	18	\$ 11,700
		<u>20</u>	<u>\$ 24,500.00</u>

TOWN OF WATERFORD

FY2026 BUDGET REQUEST

DEPARTMENT:



- **10104 – 52040 – Service Contracts & Repairs** Request: **\$7,662** **20.66% 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 annual Grand List books and the annual generation and mailing of online personal property filing and income and expense notices with unique pine # assignment.

The Assessor's Office also leases a Xerox copy machine from Connecticut Business Systems (CBS) at a fixed cost of \$158/month. Overages in the number of copies beyond the contracted amount are billed separately.

The Assessor's Office will be transitioning all existing hard-copy historical real estate files to a digital format accessible to other town departments utilizing a secure file sharing software service (Box). To accomplish this project in-house and with minimal cost, historic and future documents will be organized and scanned into Box utilizing an iPad, which has been requested for purchase through IT. In addition to the annual Box subscription a monthly T-mobile subscription for iPad connectivity is also required.

Service Cont. Fees incurred FY 24: **\$7,339**

Service Cont. & Repairs Breakdown:

QDS Grand List Binding:	\$3,075
QDS Online PP Filing:	\$1,348 <i>Estimated at 1350 accounts</i>
QDS Online I&E Filing:	\$ 442 <i>Estimated at 350 accounts</i>
CBS Copier:	\$1,896
CBS Copier overage est:	\$ 307
Box Subscription:	\$ 340 <i>annually</i>
T-Mobile subscription:	\$ 254 <i>calculated at \$21.14/month</i>
	\$7,662

TOWN OF WATERFORD

FY2026 BUDGET REQUEST

DEPARTMENT:



- **10104 – 52050 – Dues, Conf. & Education** Request: **\$2,765** **16.00% decrease**

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. The Assistant Assessor has completed 4 of the required 5 courses to attain a level I CCMA certification. 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. The Wichita Property Tax Conference is held each year in July and offers educational sessions on complex special use and public utility property valuation. 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 FY24: **\$3,006.08** (includes \$686.08 in mileage)

Assessor & Staff Dues – CAAO, NRAAO, GNLA, IAAO	\$ 635
Continuing Education – Assessor – Uconn, IAAO, Wichita, workshops	\$ 750
CAAO Biannual meetings – Assessor & Asst Assessor	\$ 280
Uconn/AAT Workshops & Courses Asst. Assessor and Aide	<u>\$ 1,100</u>
	\$ 2,765

- **10104 -52070 – Reimbursable Expense** Request: **\$1,364**

Mileage reimbursement for attendance to assessment-related courses, educational workshops and meetings were previously included in the Dues, Conferences and Education line item. Mileage estimates for FY26 are calculated at \$0.67/mile.

Assessor & Staff mileage – Annual Assessor School:	\$ 603
Assessor & Asst. Assessor mileage CAAO biannual meeting	\$ 328
Assessor & Asst. Assessor mileage Fall Symposium	\$ 131
Assessment Aide AAT course mileage – Rocky Hill	<u>\$ 302</u>
	\$ 1,364

TOWN OF WATERFORD

FY2026 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: **\$835** **11.33% increase**

The Assessor's office requires an allowance for miscellaneous items and supplies not provided as standard office supplies through the Finance Office. Necessary Assessment office supplies and equipment have not been purchased for some time and worn/broken equipment is in need of replacement. Supply funds requested are for the following items:

○ Dyna Label Rolls:	3@ \$33 each	\$100
○ Toner Cartridges public printer	2 @140 each	\$280
○ Bankers Boxes	12pk @ \$30	\$ 30
○ 3 Ring Binder 11x17 (tax map copies)	2 @ \$30	\$ 60
○ 3 Ring Binders 2 & 1 inch (4 pk each size)		\$ 72
○ Binder Tab Dividers	8 @\$4	\$ 32
○ Legal Pads (12 pk)	1 @\$38	\$ 38
○ Graph Pads (6 pk)	1 @\$22	\$ 22
○ Office Shredder		\$200
		\$834

- **10104-53200 – Motor Vehicle Pricing** Request: **\$1,190** **49.79% decrease**

Effective with the 2024 Grand List the valuation methodology for all vehicles has changed pursuant to PA 22-118 Sec. 499. Vehicles are now valued based on a set depreciation schedule applied to the original MSRP.

Each town must pay a fee to the DMV to pre-price the majority of vehicles appearing on the Grand List utilizing the JD Powers or Price Digest software. Pricing books have been phased out by JD Powers and the CAAO has negotiated with Price Digest to provide online pricing subscriptions to Assessors at a lower cost than JD Powers.

The amount requested for FY26 is estimated based on last year's pricing fee for the DMV and online Assessor subscription costs for both JD Powers (necessary to price the 2023 MV supple list using average retail value) and Price Digest for original MSRP lookup.

TOWN OF WATERFORD
PERSONNEL WORKSHEET - 04 ASSESSOR
2025/2026 FISCAL YEAR

DATE OF HIRE	EMPLOYEE	HOURS WORKED/ WEEK	HOURLY RATE FY26	SALARY FY25	SALARY FY26	LONGEVITY FY26	TOTAL EMPLOYEE SALARY	PAYROLL TAXES (F.I.C.A.)
LINE 51920								
51110 - ADMINISTRATION								
1/2/2023	ASSESSOR	40	N/A	128,454.27	131,665.63	N/A	131,665.63	10,072.42
12/07/2021	ASSISTANT ASSESSOR	40	N/A	78,338.81	80,297.28	N/A	80,297.28	6,142.74
	TOTALS			206,793.08	211,962.91	0.00	211,962.91	16,215.16
51210 - CLERICAL/TECHNICAL								
1/8/2024	ASSESSMENT AIDE III	35	\$ 25.6699	43,615.97	46,898.84	N/A	46,898.84	3,587.76
	ASSESSOR AIDE I	19	\$ -	0.00	0.00	N/A	0.00	0.00
	TOTALS			43,615.97	46,898.84	0.00	46,898.84	3,587.76
51810 - OVERTIME								
				0.00	0.00	0.00	0.00	0.00
	51910 -FRINGE/F.I.C.A.						250.00	0.00
TOTALS		FY25 FICA	19,156.29	250,409.05	258,861.75	0.00	259,111.75	19,802.92
BUDGET TOTAL W/F.I.C.A.				269,565.35			278,914.67	

*REMOVED POSITION FOR FY25/FY26

WORKDAYS
2025/2026 261

WEEKS TO BUDGET
52.2

TOWN OF WATERFORD
FRINGE BENEFITS WORKSHEET - 04 ASSESSOR
2025/2026 FISCAL YEAR

POSITION	CLOTHING ALLOWANCE	HRA FUNDING	TOTAL FRINGE BENEFITS	PAYROLL TAXES (F.I.C.A.)
LINE 51910				
GENERAL \$	250.0000		250.00	0
			0.00	
			0.00	
			0.00	
			0.00	
			0.00	
TOTALS - FRINGE BENEFITS			250.00	0.00
***ADDED TO FICA ON PERSONNEL WORKSHEET				

*general apparel fringe approved FY25

TOWN OF WATERFORD
GENERAL FUND
2025-2026 PROPOSED BUDGET

DEPT/AGENCY: 10104 ASSESSOR

LINE ITEM	DESCRIPTION	2023-2024 ACTUAL EXPENDED	2024-2025 RTM APPROP.	2024-2025 ADDITIONAL/ TRANSFERS	ACTUAL EXPEND & ENCUMB AS OF 1/1/25	2025-2026 DEPT/ AGENCY REQUEST	2025-2026 APPROVED BD/COMM	Department Request \$ Increase	Department Request % Increase
PERSONNEL COSTS									
51110	ADMINISTRATION	200,976	206,793			211,963		5,170	2.50%
51210	CLERICAL/TECHNICAL	64,594	45,797			46,899		1,102	2.41%
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52040	SERVICE CONT & REPAIRS	7,339	6,350			7,662		1,312	20.66%
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52070	REIMBURSABLE EXPENSE	0	0			1,364		1,364	
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53200	PRICING BOOKS	0	2,370			1,190		(1,180)	-49.79%
	SUBTOTAL	138	3,120	(25)	0	2,025	0	(1,095)	-35.10%
	DEPARTMENT TOTAL	297,701	287,213	24,500	0	319,641	0	32,428	11.29%

**TOWN OF WATERFORD
PROPOSED REVENUE BY DEPARTMENT
GENERAL FUND
2025-2026 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: _____

LINE ITEM	2022-2023 ACTUAL	2023-2024 ACTUAL	2024-2025 EXPECTED	2024-2025 YTD	2025-2026 PROPOSED	VARIANCE
Alarm Monitoring						\$ -
Alarm Penalties						\$ -
Ambulance Subsidy						\$ -
Beach Admission Fees						\$ -
Benefit Assessments						\$ -
Bulky Waste Fees						\$ -
Conveyance Tax						\$ -
Copy Fees	455	<u>289</u>	<u>250</u>	100	250	\$ -
East Lyme Animal Control Fee						\$ -
Enhanced E 9-1-1						\$ -
Fines/Penalties						\$ -
Hazardous Household Waste						\$ -
Inspection Fees						\$ -
Interest/Lien Fees						\$ -
Inter-Municipal Revenues						\$ -
Miscellaneous						\$ -
Permitting/Licensing Fees						\$ -
Program/Registration Fees						\$ -
Recording Fees						\$ -
Regional Communications Fees						\$ -
Rentals						\$ -
Sale of Recyclables						\$ -
State Operational Grants						\$ -
Tipping Fees						\$ -
Versa Kart/Blue Box Purchases						\$ -
TOTALS	\$ 455.00	\$ 289.00	\$ 250.00	\$ 100.00	\$ 250.00	\$ -

The Day

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

ACCOUNT NUMBER	CUSTOMER
D140217	EAST LYME ASSESSORS

CLIENT	PAGE NUMBER	DUE DATE
	Page 1 of 1	Upon Receipt

Order Number	Amount Due
d01085811	\$790.00

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

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

CHECK NUMBER

AMOUNT PAID

FILE COPY

PLEASE RETURN UPPER PORTION WITH YOUR REMITTANCE

DATE	DESCRIPTION	PUBLICATION	REFERENCE #	SIZE/LINES OR QTY	GROSS AMOUNT	OTHER	NET AMOUNT
09/18/24	10/1/2024 Grand List	The Day	10/1/2024 Grand List	2 col	\$760.00	\$0.00	\$760.00
09/18/24	10/1/2024 Grand List	Day Classified Webpage	10/1/2024 Grand List	2 col	\$30.00	\$0.00	\$30.00
Total					\$790.00	\$0.00	\$790.00

Account Number	Customer	Total Due
D140217	EAST LYME ASSESSORS	\$790.00

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

$\$790 / 4 \text{ Towns} = \197.5

Total Bill is
Shared by 4 towns
equally.

APPROVED

VENDOR# 724

PO# FY 2025

CLOSE PO Y N

ACCOUNT # 10104-52010

AMOUNT \$197.50

SIGN Ray S. Wal

DATE 9/29/2024

Paige Walton

From: Daphne Doran <ddoran@eltownhall.com>
Sent: Monday, September 23, 2024 2:33 PM
To: Melissa Kronfeld, Old Lyme Assessor; Assessor; Paige Walton
Subject: Joint Legal Ad
Attachments: Revised Billing for September legal ad.pdf

**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.**

Good afternoon. Ladies!

Attached is the invoice for the joint legal ad.

If you have any questions, please let us know.

Regards,
Daphne

Daphne Doran | Assistant Assessor

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

eltownhall.com





Legal Notice

Towns of EAST LYME, LYME, OLD LYME AND WATERFORD, CT

Filing of Tax Lists for 10/1/2024 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, 2024.

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 or a service-connected permanent and total disability in order to receive the proper amount of exemption on the **2024** Grand List. All others need only file if their percentage of disability changed since 10/1/2023.

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 Social Security 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.

Blind: 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 10/1/2024 Grand List.

Farmers: Applications for exemption on farm machinery must be filed with the Assessor by October 31, 2024.

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, 2024 and October 31, 2024 for the 10/1/2024 Grand List. Contact the Assessor's office for details.

Local Option Exemption: Under EAST 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, OLD LYME AND WATERFORD Town Ordinances, an additional veteran's 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 5:00 P.M., Monday-Thursday, 8:00 A.M. to 11:30 A.M. Fridays 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 June 20, 2024

Diane Vitagliano
Assessor
Town of East Lyme, CT

Melinda Kronfeld
Assessor
Town of Old Lyme & Lyme

Paige S. Walton
Assessor
Town of Waterford, CT



<https://qualitydatasystems.sharepoint.com/:x/y/person/emma.gibbs/EVvdtCoRlmg6J16DZCSD00Rz38DukJ8LstnFXcGIA?e=3EnWDL>

Quality Data Service, Inc.

**121 Mattatuck Heights Rd
Waterbury, CT 06705**

www.QDS.biz

Budget Letter 7/1/2025-6/30/2026

Date	Letter/Quot...
11/11/2024	2024E00161

Name / Address

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

Ship To/Bill To

Description of Services

Est QtyTotal

OPTIONAL

Increase Notices - Printing and Mailing

Printing and Processing Increase Assessor Notices

430

150.50

RE - 110

PP - 320

Folding, Stuffing, and Mailing services with Standard #10 envelope

430

98.90

**Meter mail on Postage Meter - under CASS certification
minimums of 550 pieces**

430

25.80

1st Class Postage

430

288.10

Subtotal

563.30

I&E - Printing and Mailing - BASED ON 350

Setup Charge 4 page Pre-printed I&E < 550 pieces

1

90.00

Print 4 page Pre-printed I&E with Taxpayer Information, including Printing, mailing services and Standard #10 envelope

350

96.25

Meter I&E's on Postage Meter

350

21.00

1st Class Postage - Regular Rate (METERED)

350

234.50

		Grand Total		\$16,377.80
Contact	Finance Dept		Customer Acceptance Signature: _____ Print Name and Title: _____ Customer Acceptance Date: _____	
e-mail	leo@qds.biz			
Phone #	2037559031	Ext 6555		
Leo DiNicola, CFO - 203-910-2316 (c)				

PO #:

Signature represents agreement to our Terms & Conditions:

Page 2

https://qualtrics.com/jvz/mjw/researchpoint.com/b/c/personalitemba_gda_biz/EWmTQcF7agU16DZ0308ORz3BDy4M6LSnFXcGdA?e=3EWDU

Xerox Financial Services LLC
201 Merritt 7
Norwalk, CT 06851

Cost Per Image Agreement



Supplier Name-Address:	
Owner: XEROX FINANCIAL SERVICES LLC - 201 Merritt 7, Norwalk, CT 06851	Agreement Number:
Full Legal Name: WATERFORD, TOWN OF	
Billing Address: 15 Rope Ferry Road	Contact Name: Rawle Dummatt
City: WATERFORD State: CT Zip Code:	Contact Email: rdumatt@waterfordct.org
QTY	MODEL and DESCRIPTION
1	XEROX C8045
MONTHLY IMAGE ALLOWANCE*	EXCESS IMAGE CHARGE**
1,000	0.006
0	0.06
Meter Billing Frequency (Monthly unless checked): ☐ (Other)	
* Included in Base Payment ** Plus applicable taxes	
Initial Term (in months): 63	Base Payment (plus applicable taxes): \$158.00
Frequency: ☒ Monthly ☐ Quarterly ☐ Annually	24 Rope Ferry Road
BY YOUR SIGNATURE BELOW, YOU AGREE THAT YOU ARE ENTERING INTO A NON-CANCELLABLE AGREEMENT AND THAT YOU HAVE READ AND AGREED TO ALL APPLICABLE TERMS AND CONDITIONS OF THE SUPPLIER'S TERMS 1 AND 3 HEREON.	
Authorized Signatory: [Signature]	Date: 06-20-2012
Print Name: Rawle Dummatt	Title: Purchasing Agent
Accepted By: Xerox Financial Services LLC	Date:

1. Definitions. The words "you" and "your" mean the legal entity identified in "Customer Information" above, and "XFS," "we," "us," "Xerox" 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. "Disputed Item" means the per return. "Equipment" means the items identified in "Equipment" above and in any attached Equipment schedule, plus any Software identified in section 3 hereof, accessories, accessories, replacement parts, substitutions, additions and repairs thereto. "Image Charge" means the applicable excess image charge. "Interim Period" means the period, if any, between the Acceptance Date and the Commencement Date. "Interim Payment" means one twelfth 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 Allowance listed above, the Excess Charge (unless otherwise agreed by you, Supplier and XFS), Fees and other charges you, Supplier and XFS agree will be levied 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 \$125 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 United States where XFS must file a financing statement 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 due 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 in full within 5 days after its due date, you will pay a late charge of the greater of 5% of the amount due or \$25, not to exceed the minimum amount permitted by law, for each delinquent or returned Payment, you will be entitled to the applicable fee, not to exceed \$25. Retention of title 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 License is 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 COMPANY'S 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, RESPECTIVE 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 started 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 120 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 Fair"), plus Taxes, or (b) return the Equipment within 30 days of the End Date, at your expense, fully insured, to a commercial US location XFS shall specify. You cannot return Equipment more than 15 days prior to the End Date without our consent. If we consent, no late charge you, in addition to all undisputed amounts due hereunder, on 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 options 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 one term of such item, and by the delivery of such item 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 shall 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 send Supplier for the Equipment, if you fail to accept the Equipment, you shall no longer have any 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 EXCLUDED BY ANY ALLEGED BREACH BY SUPPLIER.

\$158/mo

\$1896 annually



MAINTENANCE AGREEMENT

ORDER PACKET ID

9037

Gary De Cole

-BILLING INFORMATION-

CONTACT NAME Rawle Durnett
 COMPANY NAME Town Of Waterford
 ADDRESS 15 Rope Ferry Road
 CITY WATERFORD STATE CT ZIP 06385
 EMAIL rdurnett@waterfordct.org

-METER INFORMATION-

METER CONTACT Rawle Durnett
 METER EMAIL rdurnett@waterfordct.org
 METER PHONE 860 440 0540

EQUIPMENT

Xerox

-SHIPING INFORMATION-

CONTACT NAME Rawle Durnett
 COMPANY NAME Town Of Waterford
 ADDRESS 15 Rope Ferry Road
 CITY WATERFORD STATE CT ZIP 06385
 EMAIL rdurnett@waterfordct.org

-IT INFORMATION-

IT CONTACT
 IT PHONE
 IT EMAIL

MODEL

C8045

SERIAL

Maintenance and Supply

BASE CHARGE <u>see lease</u>	B/W COPIES INCLUDED <u>1,000</u>	B/W PRINTS INCLUDED
BASE BILLED BY <u>CBS</u>	COLOR COPIES INCLUDED <u>0</u>	COLOR PRINTS INCLUDED
A S Q M*		
OVERAGES BILLED <u>5</u>	PER COPY RATES	BILLED BY <u>CBS</u>
A S Q M*	BLACK COLOR BLACK COLOR	
	COPIES PRINTS	

ADDITIONAL NOTES

COPY MINIMUM REQUIRED ON ALL 45 PPM MODELS AND LOWER
 *A PRINT COPY IS DEFINED AS STANDARD 8 1/2" x 11"

CONTRACT DATE TO

FOR THE FIXED CHARGES THAT ARE SUBJECT TO THE TERMS SET FORTH IN THIS AGREEMENT, CONNECTICUT BUSINESS SYSTEMS' FIELD SERVICE DEPARTMENT WILL PROVIDE TECHNICAL REPAIR SERVICE IN ORDER TO MAINTAIN THE ABOVE "EQUIPMENT" IN PROPER OPERATING CONDITION

MAINTENANCE AND SUPPLY AGREEMENT COVERS CONSUMABLE ITEMS, BLACK AND COLOR TONER, WASTE TONER, DEVELOPER AND FUSER OIL. THIS EXCLUDES PAPER AND STAPLES. A PER MONTH PER MACHINE SUPPLY DELIVERY CHARGE APPLIES.

CUSTOMER ACKNOWLEDGES TO HAVE READ AND UNDERSTANDS THE TERMS AND CONDITIONS OF THIS AGREEMENT WHICH ARE CONTAINED ON BOTH SIDES OF THIS DOCUMENT AND WHICH CONSTITUTES THE ENTIRE AGREEMENT BETWEEN BOTH PARTIES. THERE ARE NO ORAL UNDERSTANDINGS, TERMS OR CONDITIONS, AND THE PARTIES MAY NOT RELY UPON ANY REPRESENTATIONS, EXPRESSED OR IMPLIED, NOT CONTAINED IN THIS AGREEMENT. THIS AGREEMENT IS NOT VALID UNTIL ACCEPTED BY CONNECTICUT BUSINESS SYSTEMS, LLC.

ALL NETWORK EQUIPMENT PLACEMENTS WILL BE EQUIPPED WITH THE CBS 360 APP FOR METER COLLECTION AT NO CHARGE. IF THE CBS 360 APP IS NOT INSTALLED, YOU WILL AGREE TO AN ADDITIONAL FEE OF \$25 PER MONTH FOR METER COLLECTION.

☒ OPT IN TO THE CBS 360 APP FOR METER COLLECTION. BY INITIALING THIS BOX YOU AGREE TO HAVE THE CBS 360 APP INSTALLED.

SELLER Connecticut Business Systems, LLC

CUSTOMER NAME TOWN OF WATERFORD

ACCEPTED BY

ACCEPTED BY Rawle Durnett

TITLE

TITLE Maintenance Manager

DATE

DATE 11/20/19

* A = Annually S = Semi-annually Q = Quarterly M = Monthly

At this time, I decline Maintenance Agreement Coverage Initials:

Billing Summary

System Information

Machine Name: XRX9C934EB37EF1
Machine Serial Number: 8TB627770
Power On Impressions: 820

Software Versions
System Software: 103.002.013.14100
Network Controller: 103.002.14100
User Interface: 103.002.14100
Marking Engine: 063.022.000
Copy Controller: 103.002.14100
Document Feeder: 007.019.000
Finisher:
Fax: 003.016.001
Copy Controller OS: 103.003.14100
Network Controller OS: 103.003.14100

Billing Meters

Fax

Embedded Fax Images Sent: 128
Embedded Fax Impressions: 877

Copy

Black Copied Impressions: 27402
Color Copied Impressions: 6010

Print

Black Printed Impressions: 137564
Color Printed Impressions: 3352

Scan

Network Scanning Images Sent: 29359
E-mail Images Sent: 0

Plain Paper:

129466

Device Totals

Black Impressions: 165843
Color Impressions: 9362
Total Impressions: 175205

7/12/24

Billing Summary

System Information

Machine Name:	XRXC934EB37EF1	Software Versions	
Machine Serial Number:	8TB627770	System Software:	103.002.013.14100
Power On Impressions:	3725	Network Controller:	103.002.14100
		User Interface:	103.002.14100
		Marking Engine:	063.022.000
		Copy Controller:	103.002.14100
		Document Feeder:	007.019.000
		Finisher:	
		Fax:	003.016.001
		Copy Controller OS:	103.003.14100
		Network Controller OS:	103.003.14100

Billing Meters

Fax		Plain Paper:	117923
Embedded Fax Images Sent:	123		
Embedded Fax Impressions:	840		
Copy			
Black Copied Impressions:	24408		
Color Copied Impressions:	5575		
Print			
Black Printed Impressions:	124321		
Color Printed Impressions:	3269		
Scan			
Network Scanning Images Sent:	28163		
E-mail Images Sent:	0		

Device Totals

Black Impressions:	149569
Color Impressions:	8844
Total Impressions:	158413

Paige Walton

From: Jeffrey Robillard
Sent: Thursday, November 14, 2024 8:20 AM
To: Paige Walton
Subject: DE box licensing

From: Jeffrey Robillard <jrobillard@waterfordct.org>
Sent: Thursday, November 14, 2024 7:09 AM
To: Paige Walton <pwalton@waterfordct.org>
Subject: box licensing

Good morning,

I have the renewal info for box. I know I am budgeting for it for next year for a single license for your department, but you would need to wait till December 2025 for that renewal/license to kick in.

If you wish to get box this December to try it out for a year, it would be \$331.58 per license for the year out of your budget. I realize this is not budgeted for this year and you do not have an IPAD yet to take advantage of that onsite ability to scan documents, take pictures, video, etc related to a property. However, that would give you 6 months of populating any data in it and figuring out the file structure that will work for you for when you do get the ipad, which if approved, you could get 7 months from now in July.

From: Shea Davy <bdavy@waterfordct.org>
Sent: Tuesday, October 8, 2024 9:02 AM
To: Nicole Serra <nserra@waterfordct.org>
Subject: RE: iPad Connection Cost

Good morning Nicole,

The price per month for the unlimited data and messaging for iPads through T-Mobile is \$21.14. As for the iPad its self it depends on the deals and promotions that they have going on.

Thank you.

Shea Davy
Purchasing Agent
Town of Waterford
15 Rope Ferry Road
Waterford, CT 06385
bdavy@waterfordct.org
860.444.5842 Direct
860.449-4194 Cell
860.440.0579 (fax)



PRIVILEGED AND CONFIDENTIAL: This communication, including attachments, is for the exclusive use of addressee and may contain proprietary, confidential or privileged information. If you are not the intended recipient, any use, copying, disclosure, dissemination or distribution is strictly prohibited. If you're not the intended recipient, please notify the sender immediately by return email and delete this communication and destroy all copies.

From: Nicole Serra <nserra@waterfordct.org>
Sent: Tuesday, October 8, 2024 8:56 AM
To: Shea Davy <bdavy@waterfordct.org>
Subject: iPad Connection Cost

Good morning,

We are working on our budget for next year. I was wondering how much would it cost through T-Mobile for a monthly connection for an iPad?

Thank you,

Nicole Serra

Assistant Assessor
Town of Waterford
(860)-444-5821
nserra@waterfordct.org

Service Contract & Repairs

qds binding and printing	\$ 4,864.50
Xerox Copier	\$ 1,896.00
Overages	
7/12/24 b&w impressions to 12/3/24 = 16,274/6 month period avg of 2,700/month	
overage for b&w copies averages 1,700 per month at .01 or \$17.00/month	\$ 204.00
color impressions = 518/6 month avg of 86/month overage at .10 or \$8.60/month	\$ 103.20
Xerox Copier Total	\$ 2,203.20
Box Subscription	\$ 340.00
T-Mobile - monthly subscription for ipad connectivity = \$21.14/month	253.68
total	<u>\$ 7,661.38</u>



INTERNATIONAL ASSOCIATION
of ASSESSING OFFICERS

Valuing the World

695 - 574179 4 5 AUTOMIXED AADC 640

Paige S. Walton
Town of Waterford
15 Rope Ferry Rd
Waterford, CT 06385-2886



FILE COPY Membership Dues - 2025

Disregard if Paid

DUES INVOICE

Please return with payment to ensure your membership does not lapse.

IAAO

314 W 10th St.
Kansas City, MO 64105-1616 USA

Telephone
Toll Free
Fax
Internet
Federal I.D. No.

816-701-8100
800-616-4226
816-701-8149
www.iaao.org
36-2210012

	Begin Date	End Date	Amount Due
Membership Dues (REG)	Jan. 1, 2025	Dec. 31, 2025	\$240
Fair and Equitable			\$0.00
Journal of Property Assessment & Administration			\$0.00

APPROVED

VENDOR# 10104-52050 223

PO# - FY 2025

CLOSE PO Y - N -

ACCOUNT # 10104-5205 TOTAL DUE: \$240

You have been a member since 06/30/2007 **AMOUNT \$240** IAAO offers six professional designations increasing competence of assessment personnel through education:

Is the following correct?

SIGN NO

(If NO make changes online or email changes to membership@iaao.org)

DATE 12-10-24



Assessment Administration Specialist
Certified Assessment Evaluator
Cadastral Mapping Specialist
Mass Appraisal Specialist
Personal Property Specialist
Residential Evaluation Specialist

Contact designations@iaao.org for more information.

Paige S. Walton
Town of Waterford
15 Rope Ferry Rd
Waterford, CT 06385-2886
Email - pw Walton@waterfordct.org

Pay online anytime at www.iaao.org!

Member Number: 00144399 (REG)
Invoice Number: 25-00144399
Amount Due: \$240
Due Date: December 31, 2024

CHECK OR CREDIT CARD ONLY

Make checks payable to IAAO in U.S. \$ currency.
For credit card payments, mail form or call 1-816-701-8103.

If you would like to make a change to information on this invoice, please call the IAAO Membership Department at 1-816-701-8103.

Memberships are non-transferable and non-refundable.

Please return form with payment to:

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

CARD NUMBER	VISA	EXPIRATION
NAME ON CARD	CVV/CID	

SIGNATURE:

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 1-816-701-8103

Northeastern Regional Association of Assessing Officers

An Affiliate of the International Association of Assessing Officers

2025 Membership Application

FILE COPY

Dear Assessing/Appraising Professional,

Below is an application to renew your membership of 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 2024 conference was hosted by New Jersey "Future at the Shore in 24." The dates of the conference were May 19-22, 2024 at Bally's Atlantic City Hotel and Casino. The 2025 conference will be hosted by Rhode Island at Newport Harbor Island Resort May 3-8, 2025. Go to NRAAO.org for details. Join us for a terrific opportunity to obtain ongoing education credits you need.

APPROVED

PLEASE keep your membership CURRENT... Membership 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

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 5001, Woodbridge, CT 06525. 10104-52050

OR PAY ONLINE - NRAAO.ORG (fees apply)

The fee structure is as follows:

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

If you have any questions, please feel free to contact me at 203-214-1781 or bquist@derbyct.gov

RENEWAL MEMBERSHIP APPLICATION 2025 NORTHEASTERN REGIONAL ASSOCIATION OF ASSESSING OFFICERS

Name: Paige S. Walton Title: Assessor Date: 10/21/2024
Jurisdiction/Firm: Town of Waterford Phone Number: (860) 444-5822
Mailing Address: 15 Rope Key Rd City: Waterford ST: CT Zip: 06385
Fax Number: — E-Mail Address: pwalton@waterfordct.org

Signature: Paige S. Walton

CLAIMANT'S CERTIFICATION AND DECLARATION

I do solemnly declare and certify under the penalties of the law that this invoice is correct in all particulars, the articles have been furnished or services rendered as stated herein, that no bonus has been given or received by any person or persons within the knowledge of this claimant in connection with the above claim and that the amount charged is a reasonable one.

Betsy A Quist

Betsy Quist, Membership Chair - Tax ID#23-7135028

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

Receipt of Payment

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

Date Recorded	Amount of Payment
1/8/2024 (check number: 316983)	90.00

Purchase Description	Amounts
Membership Dues: Paige Walton Membership Type: Regular Member	90.00
Purchase Total, Invoice #3957:	90.00 (pd)

FILE COPY

**GREATER NEW LONDON AREA ASSESSORS
ASSOCIATION**

2024 Membership Dues Notice

For April 1, 2024 through March 31, 2025

Name: Paige Walton

Municipality: Waterford

Address: 15 Rope Ferry Road

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 by 3/31/24 with completed form to:

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

APPROVED

VENDOR# 203

PO# _____ FY 24

CLOSE PO Y _____ N —

ACCOUNT # 10104-52050

****Please complete a separate form for each employee as necessary**** 15

SIGN [Signature]

DATE 3/1/24

FILE COPY

**GREATER NEW LONDON AREA ASSESSORS
ASSOCIATION**

2024 Membership Dues Notice

For April 1, 2024 through March 31, 2025

Name: Nicole Serra

Municipality: Waterford

Address: 15 Rope Ferry Road

City/State/Zip: Waterford/ CT/ 06385

Phone Number: 860-444-5821

Email: nserra@waterfordct.org

Dues are \$15.00

Make checks payable to GNLA AA

Please remit your payment by 3/31/24 with completed form to:

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

APPROVED

VENDOR# 203

PO# _____ **FY.** 24

CLOSE PO Y _____ N —

ACCOUNT # 10104-52050

AMOUNT \$15

SIGN Baige S. Wall

DATE 3/1/24

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

April 13, 2023



INVOICE

Raige Walton
Town of Waterford
15 Rope Ferry Road

Waterford, CT 06385, USA

INVOICE DETAILS

Invoice
CAAO23-04132023-1062-1040

Order
ZMN9B3Z2JNT

Invoice Date
April 13, 2023 / 11:09 AM ET

Item	Price	Quantity	Amount
CAAO Advanced Workshops - Three Day Pass	\$300.00	1	\$300.00

Order Total: \$300.00

Balance Due: \$300.00

Payment by "TouchNet" indicates a credit card payment. You will receive a separate email confirmation from TouchNet if you paid by credit card.

All checks should be made out to: "UConn - Assessors 22" and mailed to the address below.

UConn Events and Conference Services
2011 Hillside Road, Unit 1185
Storrs, CT 06269-1185
(p) 860-486-1038, (f) 860-486-1064
conferences@uconn.edu



Wichita Property Tax Conference

[View Agenda](#) → </about/conferences/>



**WICHITA
PROPERTY TAX
CONFERENCE**

July 28 - August 1, 2024

Wichita Marriott

Wichita State Hughes Metropolitan Complex

New this year! The conference will be held at Wichita State University's Eugene M. Hughes Metropolitan Complex located at 5015 East 29th St N, Wichita, KS 67220 (<https://maps.app.goo.gl/9ubdSt5c8Rag0Dd7T8>)

Register → </about/conferences/WPTC/register.php>

Book your hotel by July 12 → </about/conferences/WPTC/accommodations.php>

Collaboration Across Industries

This is an annual conference hosted on the campus of Wichita State University and provides valuation and assessment topics for complex industries.

Conference attendees are people involved in property tax matters and are from organizations including government, consultants, attorneys, accounting, software and educators.

The Wichita Property Tax Conference is the world's longest lasting and most well-attended conference for both newcomers and advanced professionals involved with complex property tax valuation and assessments.



Registration now open!

Registration Fees

\$450 for State Representatives*

\$695 for Industry Representatives

Your registration fee includes:

- 3 first-rate keynote speakers
- 14 special presentations by industry experts
- 4 breakfasts, 3 lunches, snacks morning and afternoon
- 4 evening receptions
- Exposure to current trends and changes in your industry
- A chance to participate in an industry discussion
- Unique and endless networking opportunities
- Access to all Conference information, speaker bio's, presentation handouts and event details on Whova
- Free transportation to and from the conference

Register → </about/conferences/WPTC/register.php>

***Scholarships Available** → </about/conferences/WPTC/scholarship.php>

Learn from the Experts

Start each day with inspiring
keynotes

**View All
Speakers**

→ </about/conferences/WPTC/speakers.php>



INVITATION

You are cordially invited to attend the Spring Meeting of
The Connecticut Association of Assessing Officers, Inc.

To be held at the Aqua Turf Club
556 Mulberry St, Southington, Connecticut



PROGRAM

Welcome – President Mary Gardner

Secretary's Report
Treasurer's Report
Committee Reports
Awards
Old Business
New Business

Thursday, May 2, 2024
9:30 AM - Coffee and Pastry
10:00 AM – Meeting
12:00 Noon, Social Hour
1:00 PM Luncheon

Please register your intentions to attend the Spring Meeting and Luncheon on May 2, 2024 by
registering online by 4 PM April 24, 2024

Make Checks payable to: CAAO
Mail to: Town of Wethersfield C/O Sonia Betz
505 Silas Deane Highway, Wethersfield, CT 06092-2400

- 1. CAAO MEMBERS** Reservations made online by April 24, 2024 by 4 PM
Cost per person \$70.00 **VENDOR#** PO# 10104-52050 **FY** 24
- 2. NON CAAO MEMBERS** Reservations made online by April 24, 2024 by 4 PM
Cost per person \$75.00 **T #** 10104-52050

Please make check payable to CAAO

All payments must be received before entering event

Please make (1) reservation(s) for the Annual meeting on May 2, 2024 **DATE** 3/25/24

Municipality or Company Town of Wethersfield

Please list the names of all who are attending and remit payment by mail.

Name
Raige Walton
Nicole Serra

Meal choice
Chicken
Salmon

To help ensure an accurate meal count
Please register on the CAAO member section by April 24, 2024

Go to Calendar of Events
Click on Spring Meeting
Register by clicking the Member Registration box
Do not add guests unless they are not CAAO members

Meal Choices:

Prime Rib

Chicken Kathryn – breaded and baked with white wine sauce

Pan Seared Salmon – with whole grain mustard, honey and ginger glaze

The screenshot shows a web browser window displaying the CAAO (Connecticut Association of Assessing Officers) website. The page is titled "CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS". On the left is a navigation menu with links like Home, Connecticut Association of Assessing Officers, Executive Board, Minutes, Committees, Bylaws, Code of Ethics, County Web Pages, Vendor Directory, Assessor Salary Survey, Trainers VNA Decode, Program Downloads, Upcoming Workshops 2011, Fall Symposium 2011, Calendar, My Events, My Info, iMessage, and Membership. The main content area shows event details for "Event ID: 175935" with status "On Schedule". A box labeled "Click here to register" points to the "Member Registration" link. The event description includes: "Event: Fall Meeting", "Where: Aqua Turf Southington, CT", "Address: 556 Mulberry St", "Location Website: Link", "Meeting Place: At Event Location", "Meeting Address: Same as Event Location", "Meeting Time: 9:00 AM", "Parking Cost: \$0.00", "Reg. Deadline: 11/01/2013", "Start Date-Time: 11/07/2013 - 9:30 AM", and "End Date-Time: 11/07/2013 - 9:30 AM". The event leader is Christopher Keizer, Contact Leader, 203-270-4242 M, (203) 270-4242 W. Payment details state: "Please remit payment by mail and put meal choice in comments". The location is listed as Aqua Turf Southington, CT.

**Any questions, please contact: Donna Murphy d.murphy@danbury-ct.gov or
Sonia Betz sonia.betz@wethersfieldct.gov**



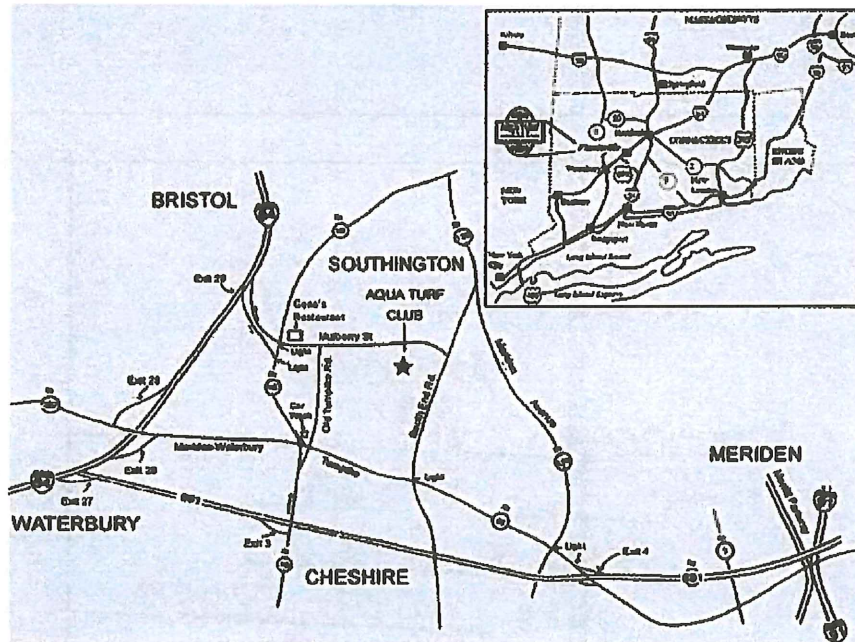
Directions

556 Mulberry Street - Plantsville, CT - 06479 (860) 621-9335 - Fax (860) 276-9966

I-84 EAST FROM WATERBURY - Take Exit 28, take right onto Route 322. Go straight, under second underpass take left at car wash onto Old Turnpike Road. At first stop sign, take right onto Mulberry Street. Aqua Turf Club is located 1/2 mile on the right.

I-84 WEST FROM HARTFORD - Take Exit 29 (left-hand exit). At the end of the exit will be a light. Go straight onto Mulberry Street. Go approximately one mile down the road - Aqua Turf Club will be on your right.

FROM I-91 OR THE MERRITT PARKWAY - Take Route 691 West toward Waterbury, take exit 4 (Southington), take a right. At the bottom of the hill (McDonald's on the corner), take a right onto South End Road. Follow until you come to Mulberry Street on the left, the Aqua Turf Club is on Mulberry Street approximately 1/4 mile on the left.



Make Checks payable to: CAAO

Mail to: Town of Wethersfield C/O Sonia Betz, 505 Silas Deane Highway, Wethersfield CT 06109-2280

PLEASE SIGN IN BEFORE YOU REGISTER

Registration Invoice

September 24, 2024

Invoice #E2910 (pg 1/1)

FILE COPY

Sold To: Nicole Serra
Town of Waterford
Waterford Town Hall
15 Rope Ferry Rd
Waterford, CT 06385-2806

Event Name: Annual Fall Meeting 2024

Dates: 11/07/24 - 11/07/24

Location: AQUATURF CLUB

Purchase Description	Amounts
Serra, Nicole Package Pan Seared Salmon - CAAO member (\$70.00 USD) APPROVED VENDOR# <u>109</u> Q# <u> </u> FY <u>24</u> SE PO Y <u> </u> N <u>X</u> OUNT # <u>10104-52050</u> OUNT <u>\$70 -</u> SIGN <u>Nicole Serra</u> DATE <u>9/24/24</u>	\$70.00 USD
Purchase Total, Invoice #E2910: Payment Received: Amount Due:	\$70.00 USD \$0.00 USD \$70.00 USD

INVITATION

You are cordially invited to attend the Annual Fall Meeting of
The Connecticut Association of Assessing Officers, Inc.

To be held at the Aqua Turf Club
556 Mulberry St, Southington, Connecticut



PROGRAM

Welcome – President Mary Gardner

Secretary's Report
Treasurer's Report
Committee Reports
Awards
Old Business
New Business

Thursday, November 7, 2024

9:30 AM - Coffee and Pastry

10:00 AM – Meeting

12:00 Noon, Social Hour

1:00 PM Luncheon

Please register your intentions to attend the Fall Meeting and Luncheon on November 7, 2024 by registering online by 4 PM October 25, 2024

Make Checks payable to: CAAO
Mail to: Town of Wethersfield C/O Sonia Betz
505 Silas Deane Highway, Wethersfield, CT 06109-2280

1. CAAO MEMBERS Reservations made online by October 25, 2024 by 4 PM

Cost per person \$70.00

2. NON CAAO MEMBERS Reservations made online by October 25, 2024 by 4 PM

Cost per person \$75.00

Please make check payable to CAAO

All payments must be received before entering event

Please make _____ reservation(s) for the Annual meeting on November 7, 2024

Municipality or Company Town of Waterford

Please list the names of all who are attending and remit payment by mail.

Name Nicole Serra
Pidge Walton

Meal choice Salmon
No meal - x

CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS, INC.

FILE COPY



30th Annual Fall Symposium

Thursday September 26, 2024
Registration begins at 8:00 am

9:00 am –

New Motor Vehicle Valuation

Presenters: Patrick Sullivan, CCMA II, Property Appraiser Town of West Hartford and Motor Vehicle Committee Co-Chair, Mary Gardner, CCMA II, Assessor of Groton, Martin Heft, Undersecretary Intergovernmental Policy and Planning Division OPM, and Mike Rell, International Governmental Strategies

1:30 pm –

Veterans Bill & Legislative Potpourri

Presenters: Pam Deziel, CCMA II, Assessor, Town of Middlefield, Stuart Topliff, CCMA II, Assessor, Town of Rocky Hill, Martin Heft, Undersecretary Intergovernmental Policy and Planning Division OPM and Mike Rell, International Governmental Strategies

6 total hours of continuing education credits

\$50 current CAAO member

\$70 not a current CAAO member

Payment can be made out to CAAO and mailed to
Chandler Rose, Assessor's Office,
979 Main Street, Willimantic, CT 06226

Registration deadline is: September 13, 2024

Breakfast will be provided at 8:00 am/Lunch will be provided at 12:00 pm
Courtyard by Marriott Cromwell
4 Sebethe Drive
Cromwell, CT 06416

CAAO 30th Annual Fall Symposium Reservation Form

Date: September 26, 2024

Time: 8:00 AM

Place: Courtyard by Marriott Cromwell, 4 Sebethe Drive, Cromwell, CT 06416

Reservation Form

Paige Walton

Name:

Please print name

Cost: \$50 (CAAO member)

Name:

Please print name

Cost: \$70 (NON CAAO member)

Town of Waterford

Municipality or Organization:

Please RSVP by Friday, September 13, 2024

Make checks out to: CAAO

Send this completed form & payment to:

CAAO

C/O Chandler Rose

Assessor's Office

979 Main Street, Willimantic, CT 06226

Phone: (860) 465-3024

assessor@windhamct.com

APPROVED

VENDOR#

69

#

FY

2025

PO

Y

N

NT #

10104 - 52050

\$50.00



8/14/2024

May 1, 2024

UConn

UNIVERSITY EVENTS AND
CONFERENCE SERVICES

INVOICE

Nicole Serra
Town of Waterford
54 Rope Ferry Road

FILE COPY

Waterford, CT 06385, USA

INVOICE DETAILS

Invoice
CCMA24-05012024-2246-1321

Order
H6N7TB6FT5D

Invoice Date
May 1, 2024 / 10:47 AM ET

Item	Price	Quantity	Amount
CCMA Course 2B	\$450.00	1	\$450.00

Order Total: \$450.00

APPROVED

VENDOR# 69
PO# FY 2024
CLOSE PO Y N ✓
ACCOUNT # 10104-52050
AMOUNT \$450 -
SIGN [Signature]
DATE 5/3/24

Balance Due: \$450.00

Payment by "TouchNet" indicates a credit card payment. You will receive a separate email confirmation from TouchNet if you paid by credit card.

All checks should be made out to: "UConn - Assessors CCMA 24" and mailed to the address below.

UConn Events and Conference Services
2011 Hillside Road, Unit 1185
Storrs, CT 06269-1185
(p) 860-486-1038, (f) 860-486-1064
conferences@uconn.edu

May 1, 2024

UConn

UNIVERSITY EVENTS AND
CONFERENCE SERVICES

INVOICE

Jessica Hewitt
Town of Waterford Assessor's Office
15 Rope Ferry Rd

FILE COPY

Waterford, CT 06385, USA

INVOICE DETAILS

Invoice
CCMA24-05012024-2254-1329

Order
LMN5SSJRY92

Invoice Date
May 1, 2024 / 10:52 AM ET

Item	Price	Quantity	Amount
CCMA Course 1A	\$450.00	1	\$450.00

Order Total: \$450.00

APPROVED

VENDOR# 69
PO# FY 2024
CLOSE PO Y N X
ACCOUNT # 10104-52050
AMOUNT 450-
SIGN [Signature]
DATE 5/3/24

Balance Due: \$450.00

Payment by "TouchNet" indicates a credit card payment. You will receive a separate email confirmation from TouchNet if you paid by credit card.

All checks should be made out to: "UConn - Assessors CCMA 24" and mailed to the address below.

UConn Events and Conference Services
2011 Hillside Road, Unit 1185
Storrs, CT 06269-1185
(p) 860-486-1038, (f) 860-486-1064
conferences@uconn.edu

FILE COPY

AAT COMMITTEE

**ADMINISTRATIVE ASSESSMENT TECHNICIAN (AAT) MODULE 1E
INTRODUCTION TO RESIDENTIAL REAL ESTATE**

DATE: Friday, April 5 & Friday April 12, 2024

TIME: 9:00 A.M. PROMPTLY – CLASS ENDS AT 4:30 P.M.
There will be a break for lunch. Lunch is not provided.

PLACE: ROCKY HILL FIRE STATION
3050 MAIN STREET
ROCKY HILL, CT 06067

APPROVED

VENDOR# 109

INSTRUCTOR: CHANDLER ROSE

PO# _____ **FY** 2024

FEE: \$100.00

CLOSE PO Y _____ N X

Registration must be received by **March 28, 2024**. Please include the completed registration form with either payment or a copy of a signed approved purchase order.
Make checks payable to **CAAO**

ACCOUNT # 10104-52050

AMOUNT 100-

Mail to: Pam Deziel
Assessor's Office
P.O. Box 179
Middlefield, CT 06455

SIGN Pam Deziel

DATE 3/11/24

Completed registration forms can be emailed to: pdeziel@middlefieldct.org.

Class registration is on a first come, first served basis with priority given to persons working in an Assessor's Office. Class size is limited to 25. For example; if 27 people sign up and 24 work in an Assessor's Office and 3 do not, the 24 people from Assessor's Offices and the first person to register not working in an Assessor's Office to register will be registered for the class. The other 2 people who don't work in an Assessor's Office will not be registered.

For additional information please contact Pam at pdeziel@middlefieldct.org or 860-349-7111.

Please return your completed registration with required fee (\$100.00).

(For AAT use only)

CHECK# _____

PO# _____

AAT MODULE 1E: INTRODUCTION TO RESIDENTIAL REAL ESTATE

NAME: Jessica Hewitt **TOWN:** Waterford Assessor's office

MAILING ADDRESS: 15 Rope Ferry Rd. Waterford, CT 06385

OFFICE PHONE: (860) 444-5820 **CELL PHONE:** (860) 367-7924

EMAIL: Jhewitt@waterfordct.org

Education & dues

\$	450.00	Wichita Tax Conference
\$	140.00	Fall Meeting Assessor & Asst Assessor
\$	140.00	Spring Meeting Assessor & Asst Assessor
\$	900.00	Annual Uconn Assessor's School Asst. Assessor & Assmt Aide
\$	300.00	Annual Uconn Assessor's School Workshops - Assessor
\$	200.00	AAT Courses - Assmt Aide (2 per year)
\$	270.00	CAAO Dues - Assessor, Asst Assessor, Asmt Aide
\$	240.00	IAAO Dues - Assessor
\$	80.00	NRAAO Dues - Assessor & Asst Assessor
\$	45.00	GNLAA Dues - Assessor, Asst Assessor, Asmt Aide
\$	<u>2,765.00</u>	

Prior year 52050 included mileage reimbursement estimate

FY26 request is for courses and meetings only

mileage reimbursement calculation is reflected in 52070 request

Reimbursable Expenses - Mileage		
375	miles to uconn Nicole	
375	miles to uconn Jessica	
150	miles to uconn Paige	
450	miles to Rocky Hill AAT Jessica	2 courses
260	miles to Aquaturf Nicole - 2 meetings	
230	miles to Aquaturf Paige - 2 meetings	
110	miles to cromwell fall symposium nicole	
85	miles to cromwell fall symposium Paige	
2035	\$	1,363.45



Aegis - Compatible Labels Replacement for DYMO 30324 (2-1/8" X 2-3/4") Diskette Media & Veterinary - Use with Labelwriter 450, 450 Turbo, 4XL Printers (12 Rolls)

Visit the Aegis Adhesives Store

4.6 ★★★★★ 616 ratings | Search reviews and Q&A

Price: \$31.26 (\$0.01 / Count)

Size: 2 1/8" X 2 3/4" - 30324

1" X 1" - 30332
\$21.90
(\$0.00 / Count)

2 1/8" X 2 3/4" - 30324
\$32.90
(\$0.01 / Count)

4" X 6" - 1744907
\$25.50
(\$0.03 / Count)

1/2" X 1" - 30333

\$19.90
(\$0.00 / Count)

Color	White
Size	2 1/8" X 2 3/4" - 30324
Material	Paper
Brand	Aegis Adhesives
Finish Type	Adhesive

About this item

- 2 1/8" X 2-3/4" Direct Thermal Labels - Non-OEM Replacement for DYMO 30324 Large Multipurpose Media Labels - Compatible with Labelwriter Printers - 1" Core, 12 Rolls / Case & 320 Labels / Roll.
- Quality - Our Priority: Smudge-free & Fade-Resistant labels. Print darker and sharper content on labels that permanently adhere to virtually any surface. Perfect size for veterinary & pharmacy prescription labels.
- Jam-Free, Headache-Free: Avoid time-consuming printer issues such as label jams and misfeeds. Aegis Adhesive labels follow extremely strict QC guidelines.
- Compatible with Aegis 450/450 Turbo Labelwriter Machines, DYMO 1 Labelwriter 450, 450 Turbo

prime

Enjoy fast, FREE delivery, exclusive deals and award-winning movies & TV shows with Prime

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Delivery

Pickup

One-time purchase:

\$32.90 (\$0.01 / Count)

FREE delivery: Monday, Oct 2 on orders over \$35.00 shipped by Amazon.

Ships from: Amazon
Sold by: Shipp'd Inc.

Subscribe & Save:

5% 10%

\$31.26 (\$0.01 / Count)

Save 5% now and up to 10% on repeat deliveries.

- No fees
- Cancel anytime
- Learn more

Get it Monday, Oct 2

In Stock

Qty: 1 ▼

Not for sale

Nicole Serra

From: Brandishea Moses
Sent: Friday, March 31, 2023 9:30 AM
To: Nicole Serra
Cc: Paige Walton
Subject: RE: HP Laser Jet Pro Toner Cartridge Replacement

Good morning,

Public printers that collect any type of revenue are not covered under the town supply line. So this would need to be covered in the line account you have provided to me 10104-53020.

Thank you. The total will be around ~~\$133~~

Shea Moses
Purchasing Agent
Town of Waterford
15 Rope Ferry Road
Waterford, CT 06385
bmoses@waterfordct.org
860.444.5842
860.440.0579 (fax)



PRIVILEGED AND CONFIDENTIAL: This communication, including attachments, is for the exclusive use of addressee and may contain proprietary, confidential or privileged information. If you are not the intended recipient, any use, copying, disclosure, dissemination or distribution is strictly prohibited. If you're not the intended recipient, please notify the sender immediately by return email and delete this communication and destroy all copies.

From: Nicole Serra <nserra@waterfordct.org>
Sent: Thursday, March 30, 2023 10:09 AM
To: Brandishea Moses <bmoses@waterfordct.org>
Cc: Paige Walton <pw Walton@waterfordct.org>
Subject: RE: HP Laser Jet Pro Toner Cartridge Replacement

Good morning,

I was under the impression that as an office supply that is offered to the public, this might be covered under the Town's general supply budget. If I am incorrect, we can take it out of our OTHER SUPPLIES line item- 10104-53020. This account only has \$80.65 in it currently so we would have to transfer money over to cover the expense.

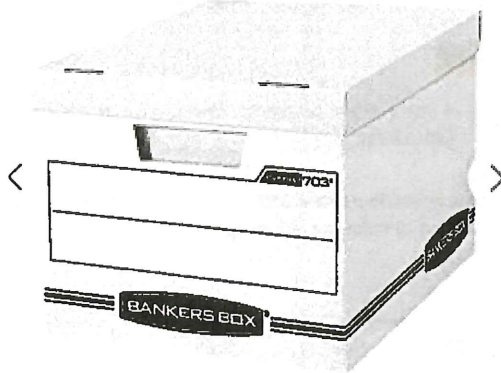
Thanks,

Nicole Serra

Assistant Assessor
Town of Waterford
(860)-444-5821
nserra@waterfordct.org

Best price with next-day delivery to 98% of the US. [Shop now](#)

Sponsored

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Item #: 478887 | Model #: 00703

4.7 ★★★★★ [395 Reviews](#) [3 Questions](#)**\$33.29**

12/carton \$2.77/Box

Klarna

4 interest-free payments. Available for orders above \$35.

[Learn More](#)**First time subscribers save 25% off your entire AutoRestock order!** Save up to 10% on all following orders. [Learn more](#)**Delivery****\$33.29****Pick up in store****\$33.29****AutoRestock****Save 25% \$24.97**Deliver **tomorrow** to Waterford, CT ✓

Order within 6 hrs 51 mins

Free Returns

Online. In store. Always free.

[Learn More](#)**Only
\$3⁹⁹**2025 22" x 17" Desk Pad
Calendar[Add to cart](#)

Quantity

1

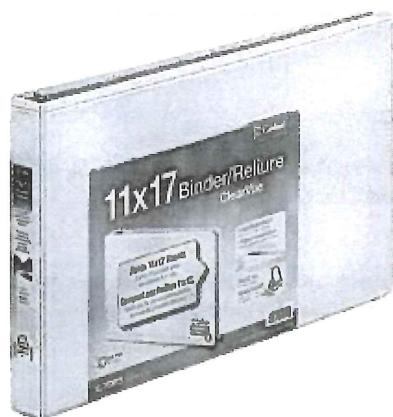
[Add to cart](#)**ECO-ID****MADE IN AMERICA** [Share](#) [Compare](#) [Add to list](#)**Save an extra \$3.20****Staples 65% Recycled Corrugated File Box Lift Off Lid, Letter/Legal Size, White/Black, 10/Pack (23325011)**★★★★★ [5192](#)**\$30.09**

1

[Add](#)

1

[Add to cart](#)**Customers bought together**

[Check taxes off your to-do list! Shop now](#)[← Back](#) | [Home](#) / [Office Supplies](#) / [Binders](#) / [More from Cardinal Binders](#)**Cardinal ClearVue 1" 3-Ring View Binder, D-Ring, White (22112V4)**

Item #: 737668 | Model #: 22112V4

4.3 ★★★★★ 100 Reviews [Ask a question](#)**\$29.59****Klarna**

4 interest-free payments. Available for orders above \$35.

[Learn More](#)**First time subscribers save 25% off your entire AutoRestock order! Save up to 10% on all following orders. [Learn more](#)****Delivery****\$29.59****1-Hour pick up****\$29.59****AutoRestock****Save 25% \$22.19**Deliver **tomorrow** to Waterford, CT ✓

Order within 4 hrs 24 mins

Free Returns

Online. In store. Always free.

[Learn More](#)**\$5⁹⁹**20W USB-C
wall chargerSUPERCHARGE
YOUR GIFTING[Add to cart](#)

Quantity

1 ▼

[Add to cart](#)[Share](#)[Compare](#)[Add to list](#)**Save an extra \$7.90****Cardinal ClearVue 1 1/2" 3-Ring View Binder, D-Ring, White (22122V3)**

★★★★★ 15

\$21.69

1 ▼

[Add](#)[Get Deals](#)**Customers bought together**

HAMMERMILL

Copy Plus® paper flash sale! \$34.99/carton
Coupon code: 37273

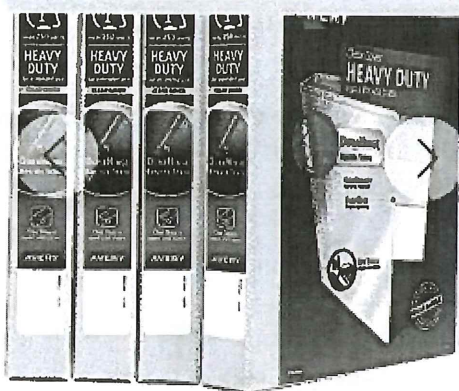
Shop now

Sponsored

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Slant Ring

14" Wide

Customizable

More Durable
than a Standard BinderSplit resistant top
and bottom
New reinforced spine
and DuraHingeEasy to open & close
No pinched fingers **In Demand! 10 sold in the last 48 hrs**

Avery Heavy Duty 1" 3-Ring View Binders, Slant Ring, White, 4/Pack (79780)

Item #: 24341276 | Model #: 79780

4.4 ★★★★★ [23 Reviews](#) | [1 Question](#)**\$31.69**

4/carton \$7.92/Binder

Klarna4 interest-free payments. Available for orders above \$35. [Learn More](#)**First time subscribers save 25% off your entire AutoRestock order!** Save up to 10% on all following orders. [Learn more](#)**Delivery****\$31.69****Pick up in store****\$31.69****AutoRestock**

Save 25%

\$23.77Deliver **tomorrow** to Waterford, CT ✓

Order within 4 hrs 22 mins

1 Video

Highlights [View all details](#)

- Designed to be stronger and more durable than basic binders, these 4 white heavy-duty binders feature a tear-resistant spine (DuraHinge) and more flexible, split-resistant edges (DuraEdge)

Free Returns

Online. In store. Always free.

[Learn More](#)**\$31.69**

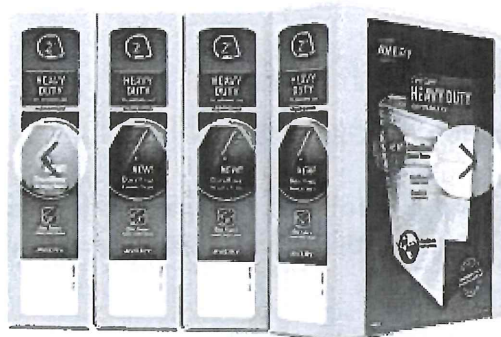
1

Get Deals

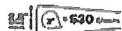
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In Demand! 12 sold in the last 48 hrs


2" Slant Ring


1 Video


Highlights [View all details](#)

- Designed to be stronger and more durable than basic binders, these 2 inch white heavy-duty binders feature a tear-resistant spine (DuraHinge) and more flexible, split-resistant edges (DuraEdge)
- Deep texture film offers a smoother finish and features a linen pattern for high-quality look and feel
- Secure but easy to open; One Touch slant rings are back mounted, gap free and release at the touch of a button

Avery Heavy Duty 2" 3-Ring View Binder, Slant Ring, White, 4/Pack (79790)

Item #: 24341278 | Model #: 79790

4.4 ★★★★★ [11 Reviews](#) [1 Question](#)**\$39.99**

4/carton \$10.00/Binder

Klarna4 interest-free payments of \$9.99. [Learn More](#)

First time subscribers save 25% off your entire AutoRestock order! Save up to 10% on all following orders. [Learn more](#)

**Delivered FREE****\$39.99****Pick up in store****\$39.99****AutoRestock****Save 25%****\$29.99**Deliver **tomorrow** to Waterford, CT ✓

Order within 4 hrs 22 mins

Free Returns

Online. In store. Always free.

[Learn More](#)
\$5⁹⁹
 20W USB-C
 wall charger
SUPERCHARGE
YOUR GIFTING**Add to cart**

Quantity

1

**Add to cart**

1

**Get Deals**

Consider this similar product



Reliable Shipping Labels

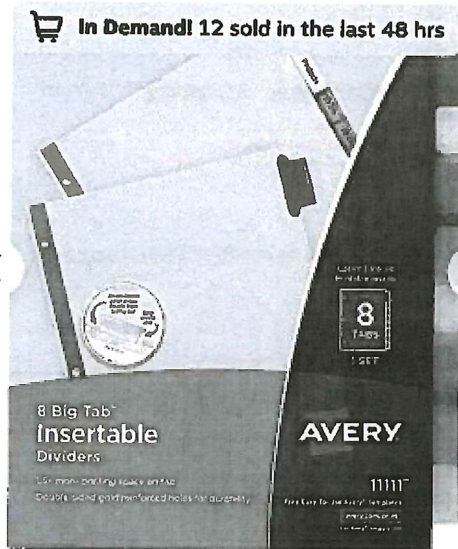


Shop Now



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Home / Office Supplies / Binder Accessories | More from Avery Binder Accessories



Avery Big Tab Insertable Paper Divider, 8 Tabs, Multicolor, 1 Set (11111)

Item #: 668485 | Model #: 11111

4.8 ★★★★★ 95 Reviews 1 Question

\$3.79

set

Klarna

4 interest-free payments. Available for orders above \$35.

[Learn More](#)First time subscribers save 25% off your entire AutoRestock order! Save up to 10% on all following orders. [Learn more](#)

Delivery

\$3.79



Pick up in store

\$3.79



AutoRestock

Save 25% \$2.84

Deliver tomorrow to Waterford, CT ✓

Order within 4 hrs 16 mins

Free Returns

Online. In store. Always free.

[Learn More](#)**\$5⁹⁹**20W USB-C
wall chargerSUPERCHARGE
YOUR GIFTING[Add to cart](#)

Quantity

1

[Add to cart](#)[Share](#)[Compare](#)[Add to list](#)

Consider this similar product



Staples Large Tab Insertable Paper Divider, 8 Tabs, Buff with Assorted-Color Tabs, 1 Set (13487/11111)

★★★★★ 181

\$3.99

1

[Add](#)

1

[Add to cart](#)[Get Deals](#)

Customers bought together

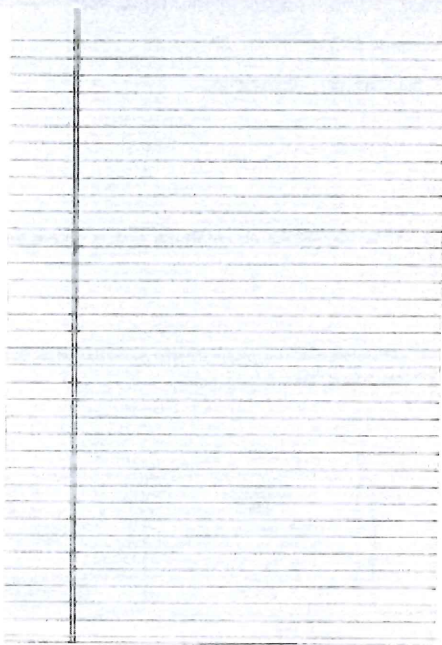
HAMMERMILL

Copy Plus® paper flash sale! \$34.99/carton

Coupon code: 37273

Shop now

Sponsored

[← Back](#) / [Home](#) / [Paper](#) / [Notebooks & Notepads](#) / [Notepads](#) / [More from TOPS Notepads](#) **Selling Fast!** Last sold 11 minutes ago**TOPS The Legal Pad Writing Pad, Canary, Legal Ruled, 50 Sheets/Pad, 12/Pack**

Item #: TOP7572 | Model #: TOP7572

No reviews yet [Write a review](#) [3 Questions](#)**\$37.26** Discontinued soon

dozen

Klarna 4 interest-free payments of \$9.31. [Learn More](#)
Delivered FREE
Pick up in storeDeliver **tomorrow** to Waterford, CT 
Order within 4 hrs 15 mins**Free Returns**

Online. In store. Always free.

[Learn More](#)**\$5⁹⁹**
20W USB-C
wall charger

Add to cart

Quantity

1 

Add to cart

Highlights [View all details](#)

- 8 1/2" x 14"
- 50 Sheets
- Legal ruled

 Share Compare Add to list**Suggested replacement****Ampad Gold Fibre Notepads, 8.5" x 11.75", Legal Rule, Canary, 50 Sheets/Pad, 12 Pads/Pk (TOP 20-020R)**

★★★★★ 37

\$53.391 

Add

Customers bought together1 

Add to cart

[Get Deals](#)

HAMMERMILL

Copy Plus® paper flash sale! \$34.99/carton
Coupon code: 37273

Shop now



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8 added to cart in the last 48 hrs

**Staples Graph Pad, 8.5" x 11", Graph Ruled, White, 50 Sheets/Pad, 6 Pads/Pack (ST57333)**

Item #: 412593 | Model #: ST57333

4.3 ★★★★★ 274 Reviews 4 Questions

\$22.19

6/pack \$3.70/Pad

Klarna

4 interest-free payments. Available for orders above \$35.

[Learn More](#)**First time subscribers save 25% off your entire AutoRestock order! Save up to 10% on all following orders. [Learn more](#)**

Delivery

\$22.19

1-Hour pick up

\$22.19

AutoRestock

Save 25% \$16.64

Deliver tomorrow to Waterford, CT ✓
Order within 4 hrs 20 mins**Free Returns**

Online. In store. Always free.

[Learn More](#)**\$5.99**20W USB-C
wall chargerSUPERCHARGE
YOUR GIFTING[Add to cart](#)

Quantity

1

[Add to cart](#)**Highlights** [View all details](#)

- 4 Squares per Inch
- Standard notepad for everyday writing
- Sheet size: 8.5" x 11" (US letter)



STAPLES BRAND

[Share](#)[Compare](#)[Add to list](#)**Consider this similar product****Staples Notepad, 8.5" x 11.75", Wide Ruled, White, 50 Sheets/Pad, 72 Pads/Pack (23643CT)**

★★★★★ 14

**\$72.79**

1

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1

[Add to cart](#)[Get Deals](#)**Customers bought together**

Save up to 30% on inkjet printers

brother



multitask Like no other

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In Demand! 21 sold in the last 48 hrs

**Staples 150-Sheet Micro-Cut Multi-Media Shredder (ST62157)**

Item #: 24581774 | Model #: ST62157

4.1 ★★★★★ [58 Reviews](#) [3 Questions](#)**\$199.99** ~~\$239.99~~ 16% off **Klarna** 4 interest-free payments of \$49.99. [Learn More](#) **Delivered FREE** **Pick up in store**Deliver **tomorrow** to Waterford, CT ✓
Order within 4 hrs 26 mins**Free Returns**

Online. In store. Always free.

[Learn More](#) **\$5⁹⁹**
20W USB-C
wall charger

1 Video

**Highlights** [View all details](#)

- The micro-cut commercial shredder function takes your data down to 4.3mm x 12mm pieces
- Provides shredding for: paper, credit cards, standard staples and small paper clips
- Quiet operation with a 65-decibel noise level



Share

Compare

Add to list

Protect your purchase

Tech help available for set-up & troubleshooting. If something happens that we can't repair it, we'll replace or reimburse you.

No protection plan

Standard Protection Plan

2-Year

\$29.99

3-Year

\$49.99**Consider this similar product**[Get Deals](#)



CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS

MOTOR VEHICLE COMMITTEE

FILE COPY

SUBSCRIPTION RENEWAL

2024 JD POWER/NADA MOTOR VEHICLE ORDER FORM

APPROVED

VENDOR# 69

PO# Friday, June 28, 2024 2025

CLOSE PO Y N

ACCOUNT # 10104-53200

AMOUNT \$1,190.00

SIGN [Signature] \$ 780

DATE 7/24/24

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

1 2024 NADA MOTOR VEHICLE PRICING

(This cost is to have your vehicles valued for your 2024 Grand List and must be ordered)

1 2024 JD Power online license (one user) \$ 285.00

1 2024 Price Digest 1 -5 licenses (up to 5 licenses) \$ 125.00

****Each town's order will include one license/user for the JD Power online program & 1 - 5 licenses/users for the Price Digest online program.**

****There are no books****

ADD Total "ADDITIONAL J.D. POWER" from page two \$ 0

TOTAL AMOUNT DUE TO CAAO, INC \$ 1,190.00

MAKE CHECK PAYABLE TO: **CAAO, INC**

MAIL PAGE ONE & TWO OF YOUR ORDER FORM W/PAYMENT TO:

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



CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS
MOTOR VEHICLE COMMITTEE

ORDER FORM - "ADDITIONAL J.D. POWER" 2024 PRICING GUIDES

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

QTY

_____ J.D. POWER CONNECT RV *Online Subscription Only \$ 190.00 ea. _____
(years 2025 - 1966)

_____ Additional J.D. POWER Online Subscription \$ 285.00 ea. _____
*ONE USER IS INCLUDED IN YOUR BASE PRICE

_____ **TOTAL ORDER**

TOTAL AMOUNT
(Add this amount to page one)

\$

MAKE CHECK PAYABLE TO:

CAA O, INC

MAIL ALL ORDER FORMS & PAYMENTS TO:

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

INVOICE DATE	INVOICE NUMBER	DESCRIPTION	INVOICE AMOUNT
05/22/2024	4468	ONLINE ACCESS GL#:10104 - 52030	\$250.00

Vendor No.	Vendor Name	Check No.	Check Date	Check Amount
63	DEPARTMENT OF MOTOR VEHICLES	319633	07/19/2024	\$250.00

**Town of Waterford**

Accounts Payable
15 Rope Ferry Rd.
Waterford, CT 06385
(860) 444-5842 Fax: (860) 440-0579

Vendor
Number

63

Check
Date

07/19/2024

Check
Number

319633

\$250.00

Two Hundred Fifty Dollars and 00 Cents

Pay
To the
Order Of

DEPARTMENT OF MOTOR VEHICLES
3RD FLOOR/FISCAL SERVICE RM327
60 STATE STREET
WETHERSFIELD, CT 06161-0000

FILE COPY
NON-NEGOTIABLE



STATE OF CONNECTICUT
DEPARTMENT OF MOTOR VEHICLES

60 State Street, Wethersfield, CT 06161
ct.gov/dmv (860) 263-5700



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

Invoice

DATE	INVOICE #
5/22/2024	4468



Inv# 4468 \$ 250.00
CT DMV
05/22/2024 # Pages 1 FP1 DOC147577

DUE DATE
7/12/2024

DESCRIPTION	QTY	AMOUNT
- PAYMENT DUE UPON RECEIPT -		
PERIOD COVERED: 7/01/24 TO 06/30/25		
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		
APPROVED		
PLEASE CONTACT THE FISCAL OFFICE AT 860-263-5269 WITH ANY QUESTIONS.	VENDOR# <u>63</u>	
	PO# <u>FY 25</u>	
PLEASE REMIT THE TOTAL DUE TO:	CLOSE PO Y <u>N</u>	
	ACCOUNT # <u>10104-52030</u>	
DEPARTMENT OF MOTOR VEHICLES 3RD FLOOR/FISCAL SERVICES RM 327 60 STATE STREET WETHERSFIELD, CT 06161	AMOUNT <u>\$250.00</u>	
	SIGN <u>[Signature]</u>	
	DATE <u>7/1/24</u>	

Please return one copy of invoice with payment.

REC'D FINANCE
JUL 2 '24 PM 12:09

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

Seat Belts Do Save Lives
DMV is an equal opportunity employer operating under an approved plan.



We thank you for your business!

INVOICE

Charles B. Feldman & Associates
Post Office Box 1236
Madison, CT 06443
203-421-8338
charles.feldman@comcast.net

DATE: OCT 1, 2024
INVOICE # 1642029215439

TO Town of Waterford
Paige Walton Assessor
15 Rope Ferry Road
Waterford, CT 06385

FILE COPY

PAYMENT TERMS		DUE DATE
Due on receipt		
DESCRIPTION		LINE TOTAL
Professional Audit Services		\$12,500.00

APPROVED

VENDOR# #2977
INVOICE # 250362 FY 2025
PO Y N ✓
INVOICE # 10104-52030
AMOUNT \$12,500
BY Paige S. Walton
DATE 10/1/2024

SUBTOTAL	\$12,500.00
SALES TAX	0
TOTAL	\$12,500.00

Make all checks payable to Charles B. Feldman & Associates LLC

Thank you for your business!

Finance Department

Memo

July 29, 2024

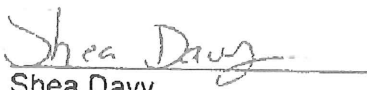
Re: Bid Waiver-Charles B. Feldman & Associates LLC-Personal Property Auditing & Consulting

Mr. Brule:

In accordance with the Purchasing Ordinance Section 3.08.050, the Purchasing Agent, on behalf of the Assessor's Office, respectfully seeks a Bid Waiver to obtain Personal Property Auditing and Consulting Services from Charles B. Feldman & Associates LLC (pending the approval for an additional appropriation) for \$24,500.00. Charles B. Feldman & Associates LLC has expertise in this area and have completed similar audits across the state of CT.

Funds will be made available in line 10104-52030 (Professional Fees), if approved.

Respectfully


Shea Davy
Purchasing Agent
Town of Waterford

Town of Waterford
Assessor's Office
15 Rope Ferry Road
Waterford, CT 06385



Phone: (860) 444-5820
Fax: (860) 444-5819

TO: Robert Brule, First Selectman
Kimberly Allen, Finance Director

Cc: Shea Davy, Purchasing Agent

FROM: Paige Walton, Assessor

RE: Additional Appropriation & Bid Waiver Request – Charles B. Feldman & Associates LLC
Personal Property Auditing & Consulting

DATE: July 19, 2024

The Assessor's office seeks to establish a personal property audit program, which includes the physical inspection of business personal property and records. Audits should be conducted regularly to maintain equity and to ensure filing accuracy. In addition to the fair and equitable distribution of the tax burden, a consistent auditing program allows for the discovery of unlisted or under-listed personal property and provides an opportunity for taxpayer education concerning complex reporting standards and requirements.

The annual personal property filing requirement is a self-reporting system. To date, other than the self-declaration form, there has been no taxpayer compliance/audit program in place to assist with the discovery and verification of taxable personal property.

As such, the Assessor's Office respectfully requests an additional appropriation in the amount of \$24,500 for line 10104-52030 **Professional Fees** for personal property auditing services, to be conducted pursuant to §12-53 of the Connecticut General Statutes for the 2021, 2022 & 2023 Grand List years.

Additionally, the Assessor's Office would like to request a waiver of competitive bidding for personal property auditing services.

Auditors must be well versed in accounting, personal property valuation, governing state statutes pertaining to the assessment and audit process, and relevant case law. Charles B. Feldman & Associates LLC have completed similar audit work throughout the state of Connecticut over the past several decades and as municipal assessors specializing in personal property, possess a very specific level of expertise in the field of auditing. As such, Charles B. Feldman & Associates LLC are uniquely qualified to assist us in establishing a robust auditing program.

We would like our request to be included on the Board of Selectman's August 6th agenda and to be forwarded to the other Boards as necessary.

Attachment.

Charles B. Feldman & Associates LLC Quote

Charles B. Feldman & Associates, LLC
Personal Property Auditing & Consulting

PO Box 1236
Madison, CT. 06443
(203) 421-8338

July 2, 2024

Paige Walton, CCMA II, Assessor
Waterford Town Hall
15 Rope Ferry Road
Waterford CT 06385

Re: Personal Property Audit Proposal

Dear Ms. Walton:

Please accept our proposal to provide personal property audit services to the Waterford Assessor's office.

The purpose of this letter is to explain the methodology and scope of services that we are prepared to engage in, as a consultant for the Town of Waterford.

The auditing services that we will perform for the Town of Waterford, based on the allocation of \$24,500, will include selected personal property accounts to be determined by the Assessor. The audits will cover the Grand List years of 2021, 2022 and 2023.

The auditing services that we will perform for the Town of Waterford will consist of the following:

We shall determine reporting accuracy, by conducting a comparison of the Personal Property Declaration filed with the Assessor to the taxpayers' Federal Income Tax Return. Specifically, we will be reviewing the following schedules: Schedule L, the Balance Sheet, Form 4562 Depreciation and Amortization, Location Fixed Asset/Depreciation Ledgers, General Ledgers, Trial Balances, Schedules of "Other Deductions" and any other schedule or books(s) of account that is necessary to successfully complete the audit. Additionally, we shall review the taxpayer's lease agreements to determine reporting accuracy. Finally, we will perform an on-site inspection of each company selected for audit.

Upon completion of each audit, the following shall be accomplished:

- A.) Deliver to the Assessor a written audit report summarizing procedures and the results of the audit. This shall be considered the legal documentation of such audit, and may be retained by the Assessor on file. This report will be signed by the Auditor and the Assessor.
- B.) The written statements and reports utilized and mentioned above shall be made on forms approved by the Assessor.
- C.) All statements and reports mentioned above shall be submitted to the Assessor within thirty (30) days of the date on which the audit is completed.

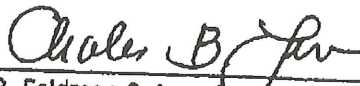
The audits will take place at a predetermined, mutually satisfactory place to both the taxpayer and the Assessor, pursuant to section 12-53 of the Connecticut General Statutes. We will be reviewing the personal property declaration from the aforementioned Grand List years that have been submitted to the Assessor. The Assessor will notify the taxpayer by certified mail of such audits.

The results of this audit will be supported by the administration of personal property assessment practices, used within the parameters of the Connecticut General Statutes. If necessary, we would defend the audit valuations in a court of law at the fee of \$500 per day.

Charles B. Feldman & Associates, LLC maintains three Certified Connecticut Municipal Assessors with over 80 years of experience on staff to provide you the utmost in professional auditing service.

If after reviewing this proposal you have any questions or would like to discuss this in more detail, please feel free to call us at (203) 421-8338. Thank you for your consideration and we look forward to serving the Town of Waterford.

Sincerely,

 PRES.
Charles B. Feldman & Associates, LLC

Personnel Assigned to Waterford Audits

Charles B. Feldman, CCMA II, Personal Property Auditor,

Professional Experience:

Charles B. Feldman & Associates LLC
(Personal Property Auditors and Certified Personal Property Revaluation Company)

City of West Haven, Assessment Auditor 1994- 2002

City of New Haven, Personal Property Auditor 1982 -1994 (On contract 1982 -1984)

Independent Personal Property Auditor 1982-Present

Professional and Service Organizations:

International Association of Assessing Officers-Personal Property Section

Connecticut Association of Assessing Officers, President, 2000

Co-Chairman and member of Connecticut Association of Assessing Officers
Personal Property Committee, 1984- present

Connecticut Association of Assessing Officers Legislative Committee, 1993- 2010

New Haven County Assessors Association, President, 1997- 1998

Publications, Presentations, and Awards:

Primary author of Public Act 99-189 "An Act Concerning Technical Changes and Clarifications to the Assessment of Personal Property" 1999

Author of "Audit section" of Handbook for Connecticut Assessors 1988 and 1998

Author of "A Systematic Methodology of Personal Property Auditing" 1987

Connecticut School for Assessors and Boards of Assessment Appeals, University of Connecticut -Institute of Public Service, Special Instructor of Personal Property Audit and Legislative workshops 1985 - present

Instructor of many and varied Personal Property workshops sponsored by CAAO, and the Society of Professional Assessors throughout New England 1987- present

Connecticut Society of Certified Public Accountants Continuing Education Conference- State Tax Forum,
Instructor, October 1997

Co- developer of the Standardized Connecticut Declaration of Personal Property, 1997.

Assessor of the Year Award -Connecticut Association of Assessing Officers, 1998.

Distinguished Service Award- Connecticut Association of Assessing Officers, May 1998.

Received CCMA Designation, June 1985.

Steven Kosofsky, CCMA II, Assessor

Mr. Kosofsky is very well known in the assessment community as an expert in the field of personal property assessment and his credentials are listed below. Mr. Kosofsky will be assisting me in this project, as his expertise is undeniable and invaluable. Any and all work done by Mr. Kosofsky will be reviewed and approved by me before being reviewed with the Assessor. Mr. Kosofsky brings over 40 years of Personal Property Assessment and audit experience to this project. His wealth of knowledge in the field of personal property audits and administration will enhance our efforts exponentially.

Professional Experience

Steven Kosofsky & Associates, LLC
(Personal Property Auditing & Consulting Company)

eQuality Valuations LLC, Waterbury, CT. 2022-Present (Director of Revaluations)

Assessor, Town of Newington, CT. 2016-2022

Quality Data Services, Waterbury CT. 2011-2016 (Software Support Consultant)

Assessor, Town of Windsor, CT. 1987-2011

Professional and Service Organizations

State of Connecticut General Assembly Task Force on Uniform Depreciation Schedules & Assessment Practices
November 1995-January 1996

International Association of Assessing Officers-Personal Property Section

Connecticut Association of Assessing Officers- Co-Chairman Legislative Committee 1997-2010

Connecticut Association of Assessing Officers- Co-Chairman Personal Property Committee 1987-1991

Publications, Presentations & Awards

Final Minority Report- State of Connecticut General Assembly Task Force on Uniform Depreciation Schedules & Assessment Practices

The Personal Property Report- Personal Property Committee
Connecticut Association of Assessing Officers, November 1988

Connecticut Society of Certified Public Accountants Continuing Education Conference- State Tax Forum
Instructor, 1993, 1997-2001

Connecticut School for Assessors & Board of Assessment Appeals
University of Connecticut/Institute of Public Service
Personal Property Workshop Instructor 1987-1991, 1997, 2001

Connecticut Association of Assessing Officers- Assessor of the Year, 1996

Received Connecticut Certified Municipal Assessor Designation, January 1980

Court Experience

J.C. Penney Company vs. Town of Manchester, CT. 2007

CL&P & Yankee Gas Services vs. City of Meriden, CT. 2001

IBM Corporation vs. Town of Southbury, CT. 1998

CLIENT LIST

City of Ansonia	Town of Barkhamsted	Town of Berlin
Town of Bethlehem	Town of Branford	City of Bridgeport
City of Bristol	Town of Brookfield	Town of Canton
Town of Cheshire	Town of Clinton	Town of Colchester
Town of Columbia	Town of Cromwell	City of Danbury
Town of Darien	Town of Deep River	City of Derby
Town of Durham	Town of East Granby	Town of East Hampton
Town of East Hartford	Town of East Haven	Town of East Lyme
Town of East Windsor	Town of Ellington	Town of Enfield
Town of Essex	Town of Fairfield	Town of Greenwich
Town of Griswold	Town of Groton	Town of Guilford
Town of Hamden	Town of Killingly	Town of Lyme
Town of Madison	Town of Manchester	Town of Mansfield
City of Meriden	Town of Middlebury	City of Middletown
Town of Montville	Town of Naugatuck	City of New Britain

CLIENT LIST (CONT.)

Town of New Canaan	Town of New Fairfield	City of New Haven
City of New London	Town of New Milford	Town of Newington
Town of Newtown	Town of North Branford	Town of North Haven
City of Norwalk	City of Norwich	Town of Orange
Town of Plainville	Town of Plymouth	Town of Prospect
Town of Rocky Hill	Town of Seymour	Town of Simsbury
Town of Southbury	Town of Southington	City of Stamford
Town of Stratford	Town of Suffield	Town of Tolland
City of Torrington	Town of Trumbull	Town of Vernon
Town of Wallingford	Town of Washington	City of Waterbury
Town Watertown	Town of West Hartford	City of West Haven
Town of Westbrook	Town of Westport	Town of Weston
Town of Wethersfield	Town of Windham	Town of Windsor
Town of Windsor Locks	Law firm of Rome McGuigan	

SERVICE DELIVERY PLAN

Please reference the enclosed **"summary of implementation of Personal Property Audit Program addendum"**.

All delivery of materials and timetables for the audit program are pursuant to 12-53 of the Connecticut General Statutes.

Summary of Implementation of Personal Property Audit Program

1. Assessor delivers accounts to be audited, and pertinent data to the auditor.
2. Assessor delivers notice of audit via certified mail to taxpayer.
3. Auditor makes contact with account in question and person responsible for handling audit process.
4. Mutually satisfactory arrangement made between taxpayer and auditor to exchange information requested.
5. Data analyzed and personal property audit report developed. All data used to develop the assessment shall be attached to the audit report. An audit reconciliation sheet shall be attached so that the Assessor can easily tie in to the audit data and audit result.
6. Audit report analyzed by Assessor and auditor.
7. Assessor reviews and signs audit report.
8. Taxpayer notified of audit result and appeal process and sent personal property audit report. This will aid the taxpayer to comprehend the audit results and file accurate personal property declarations in the future.
9. The taxpayer may present any unresolved discrepancies to the Assessor and auditor and a meeting be scheduled to discuss the problem.
10. Assessor makes certificate of correction based on results of the audit and a new tax bill is generated.

Methodologies Used For Personal Property Auditing

The methodologies employed by the auditor must remain consistent with the methodologies requested and used by the Assessor to determine the value originally. The purpose of an audit is to add omitted property not to revalue existing property. The only true practical method used in the State of Connecticut to value personal property is acquisition cost minus depreciation (per CAAO Handbook). The Personal Property declaration requires information to be submitted in a specific format: Asset cost, asset type and acquisition year; we audit on that format. We as auditors must remain uniform and equitable in our audit practices and procedures. The Assessor has inherent powers to employ alternate methodologies but should first give the taxpayer the opportunity to declare on that alternative method before any audit on that method is initiated. In the case of non-compliance by the taxpayer, alternative methods, i.e. gross rent multipliers, unit cost, income approach and even sales comparison approach may be employed as it becomes necessary to assess on "the best available information" per 12-53(b) of the Connecticut General Statutes. However, these circumstances are extremely uncommon. There is no justifiable basis to change methodology if the taxpayer complies with the audit data requests in the format that the Assessor has originally required.

Number of Years in Business Specializing in Municipal Personal Property Tax Audits

I have been an individual performing Personal Property audits continually from 1982 to the present. I have a unique perspective in the fact that I am one of the only Personal Property Auditors who is also a Certified Connecticut Municipal Assessor. I have over 40 years of experience in this very specific field and am also valuation certified. I am very active in the assessment community; being President of the Connecticut Association of Assessing Officers, Co-Chairman of the CAAO Personal Property Committee and a member of the CAAO Legislative Committee. I am the primary author of the most comprehensive personal property legislation ever enacted into law in the State of Connecticut, which passed in the 1999 legislative session. This gives me experience into audit administration and law that a CPA does not possess. I have been and continue to be an instructor at the University of Connecticut Assessor's School. I have been teaching auditing techniques and legislative interpretation each summer since 1985. I pride myself on the solid, positive relationships that have been developed with my fellow assessors through the years. I retain a reputation of being available for my colleagues long after the audit process has been completed.

Costs and Billing

Costs

The cost to complete an audit for any account with a pre-audited gross assessment of 1.0 million or under is \$650.00 per account.

For any account with a pre-audited gross assessment exceeding 1.0 million dollars, the cost to complete the audit per account shall be as follows:

1.01 million – 2.5 million	\$2,000.00
2.51 million – 5.0 million	\$3,000.00
5.01 million – 10 million	\$4,000.00
10.1 million – 20 million	\$5,500.00
20 million +	\$6,000.00 + up

Billing

Upon approval by the Assessor, we prefer to bill on a mutually agreed amount at the inception of the audit process, and the balance upon completion of said audits.

FY25-26 Postage Estimate

	Postage Items	Postage Fees
I&E Penalty Notices	32	
Increase Notices		
PP	1270	
RE	478	
PP Audit Notices Certified	26	
PP Audit Result Notices Certified	26	
PP Audit 2nd request for documentation	8	
Elderly Letters	111	
Elderly Reminders	39	
Eld Cert of Mailing	39	\$ 19.50
Advets & Local Vets	78	
Certified Mail Pieces	52	\$ 252.20
Regular Mail Pieces	2055	\$ 1,500.15
Estimated additional 15 pieces of mail per month		
May-Dec (General Taxpayer correspondence)	120	\$ 87.60
Estimated FY25-26	<u>2227</u>	<u>\$ 1,859.45</u>