

**TOWN OF WATERFORD
GENERAL FUND
2022-2023 PROPOSED BUDGET**

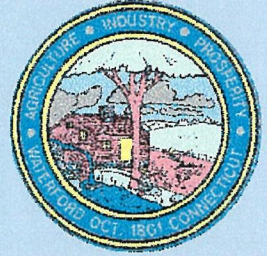
DEPT/AGENCY:

10104

ASSESSOR

LINE ITEM	DESCRIPTION	2020/2021 ACTUAL EXPENDED	2021/2022 RTM APPROP.	2021/2022 ADDITIONAL/ TRANSFERS	ACTUAL EXPEND & ENCUMB AS OF 1/1/22	2022/2023 DEPT/ AGENCY REQUEST	Department Request \$ Increase	Department Request % Increase
	PERSONNEL COSTS							
51110	ADMINISTRATION	196,533	196,788	(65,000)	123,425	169,295	(27,493)	-13.97%
51210	CLERICAL/TECHNICAL	64,060	62,788		26,983	62,224	(564)	-0.90%
51810	OVERTIME	0	0		0	0	0	#DIV/0!
51910	FRINGE BENEFITS	891	2,408		0	0	(2,408)	0.00%
51920	F.I.C.A	19,009	20,041		9,891	17,711	(2,330)	-11.63%
	SUBTOTAL	280,493	282,025	(65,000)	160,299	249,230	(32,795)	-11.63%
	SERVICES							
52010	ADVERTISING	214	400		0	400	0	0.00%
52020	POSTAGE	1,286	1,031		138	1,068	37	3.59%
52030	PROFESSIONAL FEES	2,650	250	65,000	45,562	250	0	0.00%
52040	SERVICE CONT & REPAIRS	5,487	5,666		2,242	5,921	255	4.50%
52050	DUES, CONF., & EDUCATION	380	1,825		265	1,825	0	0.00%
	SUBTOTAL	10,017	9,172	65,000	48,207	9,464	292	3.18%
	MATERIALS & SUPPLIES							
53020	OTHER SUPPLIES	282	150		71	150	0	0.00%
53200	PRICING BOOKS	470	500		0	500	0	0.00%
	SUBTOTAL	752	650	0	71	650	0	0.00%
	DEPARTMENT TOTAL	291,262	291,847	0	208,577	259,344	(32,503)	-11.14%

**TOWN OF WATERFORD
FY2023 BUDGET REQUEST
DEPARTMENT**

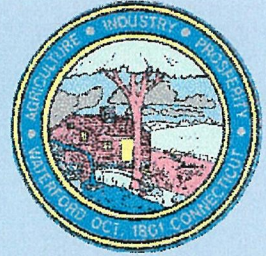


BUDGET FUNCTION

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

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

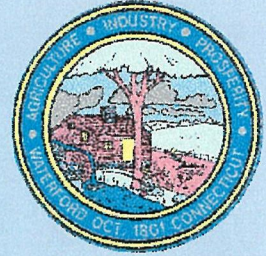
TOWN OF WATERFORD FY2023 BUDGET REQUEST DEPARTMENT



BUDGET SUMMARY

Line Item	FY 2021 Appropriated	FY2022 Appropriated	FY 2023 Request	Change from FY 2022 (+/-) \$0
PERSONNEL COSTS				
51110 Administration	196,788	196,788	169,295	-27493
51210 Clerical/Technical	58,818	62,788	62,224	-564
51810 Overtime	0	0	0	0
51910 Fringe Benefits	2697	2408	0	-2408
51920 FICA	19,761	20,041	17,711	-2,330
SUBTOTAL	278,064	282,025	249,230	-32795
SERVICES				
52010 Advertising	650	400	400	0
52020 Postage	744	1031	1068	37
52030 Professional Fees	0	250	250	0
52040 Serv Cont & Repairs	1680	5666	5921	255
52050 Dues, Conf. & Education	1825	1825	1825	0
52070 Reimbursable Expense	0	0	0	0
SUBTOTAL	4,899	9,172	9,464	292
MATERIALS & SUPPLIES				
53020 Other Supplies	150	150	150	0
53200 Pricing Books	500	500	500	0
SUBTOTAL	650	650	650	0
DEPARTMENT TOTAL	283,613	291,847	259,344	-32,503

**TOWN OF WATERFORD
FY2023 BUDGET REQUEST
DEPARTMENT**



BUDGET EXPLANATIONS BY CATEGORY

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

Budget Request: **\$249,230**

11.63% decrease

*Turnover in Assessment staff in FY21/22

See the Personnel/Fringe Benefit Spreadsheet for calculations.

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

Budget Request:

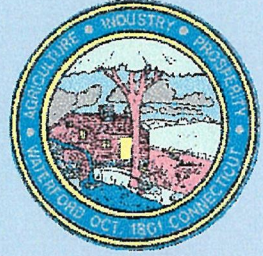
- **10104-52010 – Advertising** Request: **\$400** **0% increase**

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

Advertising Breakdown:

Combined Legal Ad:	\$250
Elderly Legal Ad:	<u>\$150</u>
	\$400

TOWN OF WATERFORD FY2023 BUDGET REQUEST DEPARTMENT



- **10104-52020 – Postage** Request: **\$1068** **3.59% increase**

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

Elderly Homeowners/Totally Disabled Program re-applications and reminder letters
Additional veteran's re-applications and reminder letters
Personal Property and Real Estate increase notices
Income & Expense forms for commercial/income producing properties

Postage costs incurred in FY21 = **\$1286.28** *greater than typical monthly correspondence total due to Covid-19.

Postage Breakdown:

Monthly Correspondence:	\$360	Est. @ \$30/mo
Increase Notices:	\$411	709 @ .58
Elderly Applications/reminders:	\$ 99	Feb. 150@.58 + April nonfilter letters <u>20@.58</u>
Advets reminders:	\$23	<u>40@.58</u>
Inc. & Expense Forms:	<u>\$175</u>	<u>301@.58</u>
	\$1068	

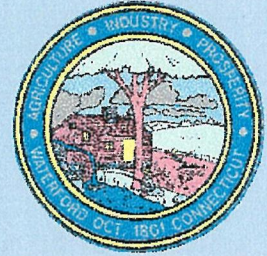
- **10104-52030 – Professional Fees** Request: **\$250** **0% increase**

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.

- **10104-52040 – Service Cont & Repairs** Request: **\$5,921** **4.5% 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 notices with unique pin # assignment.

TOWN OF WATERFORD FY2023 BUDGET REQUEST DEPARTMENT



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

Service Cont. Fees incurred FY21 **\$5487**

Service Cont. & Repairs Breakdown:

QDS Grand List Binding:	\$2,835
QDS Online PP Filing:	\$1,190 <i>Estimated at 1350 accounts</i>
CBS Copier:	<u>\$1,896</u>
	\$5,921

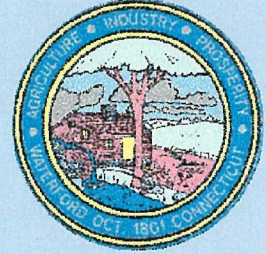
- **10104 -52050 – Dues, Conf. & Education** Request: **\$1,825** **0% inc**

Continuing education, (50 credit hours over 5 years) is required statutorily to meet recertification standards for all Certified Connecticut Municipal Assessors. New staff will require course attendance for training in assessment administration/statutes through educational programs provided by the Connecticut Association of Assessing Officers (CAAO). Courses and workshops are offered in June at the UCONN Assessor School and throughout the year as determined annually by the CAAO's Education Committee. Additional continuing education credits for the Assessor will be received for certain conference attendance on assessment and statute related topics throughout the year. Dues are annually recurring for the CAAO, IAAO, NRAAO and GMNLAA, 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 FY21 to date: **\$380**

Assessor Dues – CAAO, NRAAO, GNLA,IAAO	\$350
Asst Assessor Dues - CAAO	\$295
Cont. Ed – Assessor – Uconn	\$530
UConn/Ed – Asst & Aide \$325/pp	<u>\$650</u>
	\$1825

TOWN OF WATERFORD FY2023 BUDGET REQUEST DEPARTMENT



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

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

The Assessor's Office requires an allowance for miscellaneous items not provided by others. Fees incurred in FY21: **\$282** replacement of 2 broken task chairs, additional supplies, office's portion of Finance Infoshred bill. FY22 to date: **\$71** – 2 replacement calculators, scissors.

- **10104-53200 – Pricing Books** Request: **\$500** **0% increase**

Pricing guides are provided through a bulk purchase contract conducted by the CAAO. The 5 most common pricing books (NADA – as recommended by OPM) were packaged last year at a cost of \$470 and are estimated to increase slightly in cost. Online pricing tools will be utilized for unique categories/older/antique vehicles to avoid purchasing additional pricing manuals as was past practice.
Fees incurred in FY21: **\$470**

**TOWN OF WATERFORD
PERSONNEL WORKSHEET - DEPARTMENT NAME
2022-2023 FISCAL YEAR**

LINE 51920

DATE OF HIRE	POSITION	HOURS WORKED/ WEEK	HOURLY RATE	SALARY 2021/2022	SALARY 2022/2023	LONGEVITY	TOTAL EMPLOYEE SALARY	PAYROLL TAXES (F.I.C.A)
							0	0
							0	0
51110 - ADMINISTRATION							0	0
vacant	Assessor	40	N/A	98,295	98,295	0	98,295	7,520
12/7/2021	Asst Assessor	40	N/A	96,326	71,000	0	71,000	5,432
		*Prev Asst Longevity		2,167			0	0
	Total Administration			196,788	169,295		169,295	12,951
							0	0
51210 - Clerical/Technical							0	0
8/30/2021	Assessment Aide III	35	22.0607	41,713	40,305	0	40,305	3,083
	AS-G, Step 1						0	0
							0	0
10/30/2017	Assessment Aide II	19	22.1000	21,075	21,919	0	21,919	1,677
							0	0
	Total Clerical/Technical			62,788	62,224		62,224	4,760
							0	0
							0	0
							0	0
							0	0
							0	0
							0	0
							0	0
							0	0
51810 - OVERTIME				0.00	0.00		0.00	0.00
TOTALS - DEPARTMENT				259,576	231,519	0	231,519	17,711

WORKDAYS

2022/2023

WEEKS TO BUDGET

261

52.2

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

06/30/21

P 6
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FOR 2021 13

ACCOUNTS FOR: 04 ASSESSOR	ORIGINAL APPROP	REVISED BUDGET	YTD EXPENDED	MTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
101 GENERAL FUND							
10104 ASSESSOR							
44003 STREET CARDS							
10104 44003 STREET CARDS	0	0	-273.00	.00	.00	273.00	100.0%
TOTAL ASSESSOR	0	0	-273.00	.00	.00	273.00	100.0%
TOTAL GENERAL FUND	0	0	-273.00	.00	.00	273.00	100.0%
TOTAL ASSESSOR	0	0	-273.00	.00	.00	273.00	100.0%
TOTAL REVENUES	0	0	-273.00	.00	.00	273.00	

Fy 2021

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

07/31/21

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FOR 2022 01

JOURNAL DETAIL 2022 1 TO 2022 1

ACCOUNTS FOR:
04 ASSESSOR

ORIGINAL
APPROP

REVISED
BUDGET

YTD EXPENDED

MTD EXPENDED

ENCUMBRANCES

AVAILABLE
BUDGET

PCT
USED

101 GENERAL FUND

10104 ASSESSOR

44003 STREET CARDS

10104 44003 STREET CARDS	0	0	-35.00	-35.00	.00	35.00	100.0%
2022/01/000504 07/31/2021 GCR	-35.00	REF					
				ASSESSOR 073021			
TOTAL ASSESSOR	0	0	-35.00	-35.00	.00	35.00	100.0%
TOTAL GENERAL FUND	0	0	-35.00	-35.00	.00	35.00	100.0%
TOTAL ASSESSOR	0	0	-35.00	-35.00	.00	35.00	100.0%
TOTAL REVENUES	0	0	-35.00	-35.00	.00	35.00	

July 21 -
Dec. 21
YTD =
166.25



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

08/31/21

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FOR 2022 02

JOURNAL DETAIL 2022 2 TO 2022 2

ACCOUNTS FOR:
04 ASSESSOR

ORIGINAL
APPROP

REVISED
BUDGET

YTD EXPENDED

MTD EXPENDED

ENCUMBRANCES

AVAILABLE
BUDGET

PCT
USED

101 GENERAL FUND

10104 ASSESSOR

44003 STREET CARDS

10104 44003 STREET CARDS

0

0

-52.00

-17.00

.00

52.00

100.0%

2022/02/000310 08/31/2021 GCR

-17.00 REF

083121 ASSESSOR AUGUST

TOTAL ASSESSOR

0

0

-52.00

-17.00

.00

52.00

100.0%

TOTAL GENERAL FUND

0

0

-52.00

-17.00

.00

52.00

100.0%

TOTAL ASSESSOR

0

0

-52.00

-17.00

.00

52.00

100.0%

TOTAL REVENUES

0

0

-52.00

-17.00

.00

52.00

Aug 21

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

09/30/21

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FOR 2022 03

JOURNAL DETAIL 2022 3 TO 2022 3

 ACCOUNTS FOR:
 04 ASSESSOR

 ORIGINAL
 APPROP REVISED
 BUDGET

YTD EXPENDED

MTD EXPENDED

ENCUMBRANCES

 AVAILABLE
 BUDGET

 PCT
 USED

101 GENERAL FUND

10104 ASSESSOR

44001 MAPS

10104 44001 MAPS	0	0	-7.50	-7.50	.00	7.50	100.0%
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2022/03/000304 09/30/2021 GCR

-7.50 REF

ASSESSOR SEPT 2021

44003 STREET CARDS

10104 44003 STREET CARDS	0	0	-92.00	-40.00	.00	92.00	100.0%
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2022/03/000304 09/30/2021 GCR

-40.00 REF

ASSESSOR SEPT 2021

TOTAL ASSESSOR	0	0	-99.50	-47.50	.00	99.50	100.0%
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TOTAL GENERAL FUND	0	0	-99.50	-47.50	.00	99.50	100.0%
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TOTAL ASSESSOR	0	0	-99.50	-47.50	.00	99.50	100.0%
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TOTAL REVENUES	0	0	-99.50	-47.50	.00	99.50	
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Sept 1

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

10/31/21

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FOR 2022 04

JOURNAL DETAIL 2022 4 TO 2022 4

ACCOUNTS FOR: 04 ASSESSOR	ORIGINAL APPROP	REVISED BUDGET	YTD EXPENDED	MTD EXPENDED	ENCUMBRANCES	AVAILABLE BUDGET	PCT USED
101 GENERAL FUND							
10104 ASSESSOR							
44001 MAPS							
10104 44001 MAPS	0	0	-10.75	-3.25	.00	10.75	100.0%
2022/04/000277 10/29/2021 GCR	-3.25 REF				ASSESSOR 102921		
44003 STREET CARDS							
10104 44003 STREET CARDS	0	0	-132.00	-40.00	.00	132.00	100.0%
2022/04/000277 10/29/2021 GCR	-40.00 REF				ASSESSOR 102921		
TOTAL ASSESSOR	0	0	-142.75	-43.25	.00	142.75	100.0%
TOTAL GENERAL FUND	0	0	-142.75	-43.25	.00	142.75	100.0%
TOTAL ASSESSOR	0	0	-142.75	-43.25	.00	142.75	100.0%
TOTAL REVENUES	0	0	-142.75	-43.25	.00	142.75	

Oct 21

+ 23.50

TOWN OF WATERFORD

RECEIPT REPORT

TO: Finance Department

Deposit Date 12-2-2021

FROM: Assessor

Date 12-2-2021

Org	Obj	Description	Amount
10104 - 44001		Maps	<u>7.50</u>
10104 - 44003		Street Cards	<u>16.00</u>

Check No.	Amount

Totals \$ 23.50 ✓

Summary

Cash	<u>23.50</u>
Checks	
ACH	
Deposit Slip	\$ <u>23.50</u> ✓

Explanation

Kelcie Sumin
 Department Representative
He. [Signature]
 Received by Finance
12-2-21
 Date

**TOWN OF WATERFORD, CONNECTICUT
STATEMENT OF EXPENDITURES AND OTHER FINANCING USES-
ORIGINAL BUDGET AND ACTUAL-GENERAL FUND
FOR THE FIVE YEARS ENDED JUNE 30, 2021**

	FY2021 ORIGINAL BUDGET	FY2021 ACTUAL	FY2020 ORIGINAL BUDGET	FY2020 ACTUAL	FY2019 ORIGINAL BUDGET	FY2019 ACTUAL	FY2018 ORIGINAL BUDGET	FY2018 ACTUAL	FY2017 ORIGINAL BUDGET	FY2017 ACTUAL
GENERAL GOVERNMENT:										
SELECTMEN:										
PERSONNEL	194,527	189,468	192,636	193,364	187,217	186,942	180,299	182,341	179,360	179,715
SERVICES	5,675	3,412	7,537	5,847	43,037	54,805	43,130	117,200	43,130	65,650
MATERIALS & SUPPLIES	1,118	8,358	1,150	193,679	875	802	925	851	925	660
TOTAL	201,320	201,238	201,323	392,890	231,129	242,549	224,354	300,392	223,415	246,025
REGISTRAR OF VOTERS:										
PERSONNEL	63,535	62,703	60,918	58,970	61,103	69,430	58,808	58,643	51,240	61,246
SERVICES	5,599	4,375	5,484	5,195	5,812	5,486	5,758	5,599	7,777	7,785
MATERIALS & SUPPLIES	5,144	2,595	5,679	5,636	4,764	7,379	4,491	4,573	6,511	4,999
EQUIPMENT	1	0	1	0	1	0	1	0	1	0
TOTAL	74,279	69,673	72,082	69,800	71,680	82,295	69,058	68,816	65,529	74,030
BOARD OF FINANCE:										
PERSONNEL	4,400	1,571	3,807	1,358	4,690	2,440	4,690	3,203	4,689	3,348
SERVICES	61,600	60,494	60,475	60,050	52,375	58,853	52,225	50,467	48,825	49,061
MATERIALS & SUPPLIES	0	16	30	9	30	8	30	30	30	30
TOTAL	66,000	62,081	64,312	61,417	57,095	61,302	56,945	53,700	53,544	52,439
ASSESSOR:										
PERSONNEL	278,064	280,493	278,064	284,703	270,590	277,770	278,921	262,102	296,980	388,879
SERVICES	4,899	10,017	4,899	4,976	28,657	39,394	28,098	26,548	26,776	26,239
MATERIALS & SUPPLIES	650	752	650	527	549	1,139	1,048	937	1,094	711
TOTAL	283,613	291,263	283,613	290,206	299,796	318,303	308,067	289,588	324,850	415,829

**TOWN OF WATERFORD, CONNECTICUT
STATEMENT OF EXPENDITURES AND OTHER FINANCING USES-
ORIGINAL BUDGET AND ACTUAL-GENERAL FUND
FOR THE FIVE YEARS ENDED JUNE 30, 2021**

	FY2021 ORIGINAL BUDGET	FY2021 ACTUAL	FY2020 ORIGINAL BUDGET	FY2020 ACTUAL	FY2019 ORIGINAL BUDGET	FY2019 ACTUAL	FY2018 ORIGINAL BUDGET	FY2018 ACTUAL	FY2017 ORIGINAL BUDGET	FY2017 ACTUAL
BOARD OF ASSESSMENT APPEALS:										
PERSONNEL	1,038	614	1,218	1,128	1,164	573	2,647	2,063	730	827
SERVICES	550	452	950	318	1,000	335	1,143	276	736	326
TOTAL	1,588	1,066	2,168	1,446	2,164	908	3,790	2,339	1,466	1,153
TAX COLLECTOR:										
PERSONNEL	175,509	174,740	174,655	169,175	167,249	170,351	165,367	165,400	164,854	155,595
SERVICES	30,567	27,211	29,432	28,758	38,671	36,865	38,819	39,447	38,094	35,348
MATERIALS & SUPPLIES	30	936	30	0	30	16	50	50	80	24
EQUIPMENT	50	50	100	575	1,900	1,890	0	0	200	200
TOTAL	206,156	202,938	204,217	198,508	207,850	209,122	204,236	204,897	203,228	191,167
FINANCE:										
PERSONNEL	553,370	543,754	554,392	535,897	543,364	529,400	519,526	490,698	519,349	562,414
SERVICES	117,900	90,540	117,908	98,645	147,087	125,688	132,078	115,214	347,478	321,363
MATERIALS & SUPPLIES	30,000	29,330	30,000	20,623	30,000	25,232	35,000	23,045	35,000	32,276
EQUIPMENT	0	70	0	0	500	199	0	0	34,729	35,580
TOTAL	701,270	663,694	702,300	655,165	720,951	680,519	686,604	628,957	936,556	951,633
LEGAL DEPARTMENT:										
SERVICES	298,000	322,134	298,000	307,357	298,000	302,413	289,000	284,074	289,000	282,648
TOTAL	298,000	322,134	298,000	307,357	298,000	302,413	289,000	284,074	289,000	282,648
TOWN CLERK:										
PERSONNEL	232,562	235,831	230,832	231,299	223,232	224,171	216,337	219,270	215,620	219,229
SERVICES	30,004	31,859	32,004	31,780	34,204	25,354	33,804	28,852	31,455	29,547
MATERIALS & SUPPLIES	2,853	1,450	2,853	2,112	2,853	3,190	2,903	1,597	1,004	1,097
OFFICE EQUIPMENT	1,890	1,890	1	0	1	0	4,620	4,603	1	0
TOTAL	267,309	271,030	265,690	265,191	260,290	252,715	257,664	254,322	248,080	249,873

FIFTEEN ROPE FERRY ROAD



WATERFORD, CT 06385-2886

Assessor's Office

FY 2021-2022

GL 2020

Staff: Paige Walton, Charles Lobacz, Richard Messina

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

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

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

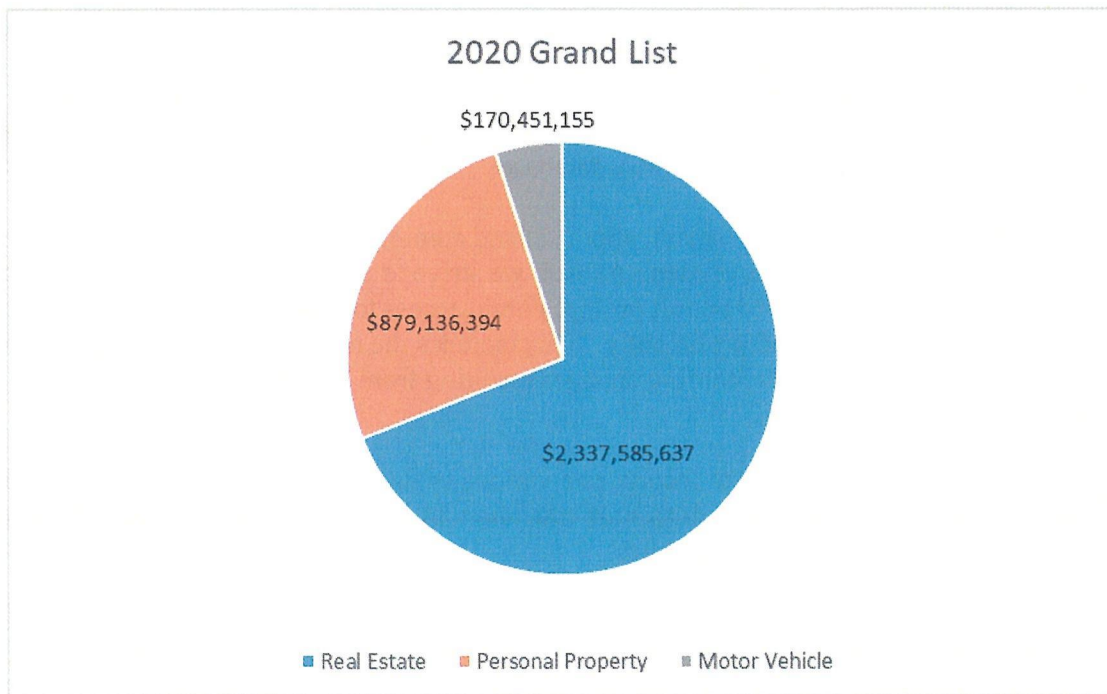
The Assessment Department continues to incorporate various technological advances including online personal property declaration filing, as well as staff education, to improve our administrative processes and increase our efficiency in serving the public.

Before corrections and Board of Assessment Appeals adjustments the 2020 Net Grand List totaled \$3,387,908,016. The Board of Assessment Appeals met remotely via zoom in the month of March and reduced the Net Grand List by \$734,830. The final 2020 taxable net Grand List as reported to OPM was:

\$3,387,173,186

2020 Grand List summary:

2020 GRAND LIST OF TAXABLE AND EXEMPT				
TYPE OF ACCOUNT	# OF ACCOUNTS	GROSS ASSESSMENT	TOTAL EXEMPTIONS	TOTAL NET VALUE
Real Estate Regular	9024	\$ 2,341,082,613	\$ 34,737,246	\$ 2,306,345,367
Real Estate Elderly Homeowner	249	\$ 32,922,910	\$ 1,126,250	\$ 31,796,660
Total Real Estate Taxable	9273	\$ 2,374,005,523	\$ 35,863,496	\$ 2,338,142,027
Real Estate Exempt	298	\$ 288,668,010	\$ 288,668,010	\$ -
Real Estate Totals	9571	\$ 2,662,673,533	\$ 324,531,506	\$ 2,338,142,027
Personal	1280	\$ 908,098,600	\$ 28,783,766	\$ 879,314,834
Motor Vehicle	<u>19805</u>	<u>\$ 172,797,105</u>	<u>\$ 2,345,950</u>	<u>\$ 170,451,155</u>
Total MV & PP	21085	\$ 1,080,895,705	\$ 31,129,716	\$ 1,049,765,989
Final Total	30656	\$ 3,743,569,238	\$ 355,661,222	\$ 3,387,908,016
Final Total Taxable M13	30656	BAA CHANGE	\$ (734,830)	\$ 3,387,173,186

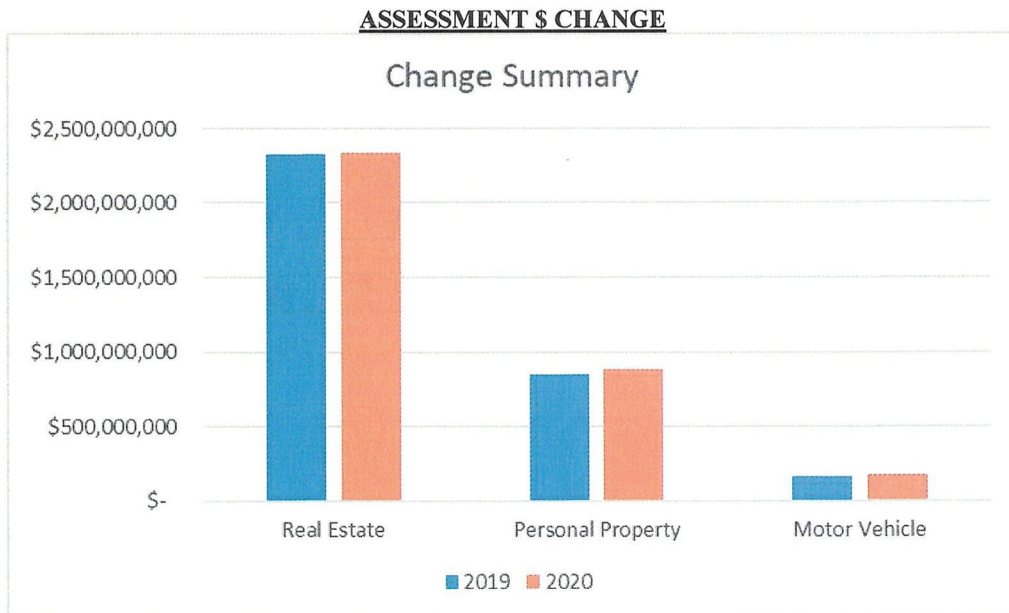


Summary of Change

The 2020 Assessor's Grand List realized a net increase of \$56,216,229 or a net change of 1.69%. This Grand List growth is due primarily to new construction and property improvements resulting from building permits and from a close review of property sales wherein significant property improvements were noted. Increases in the declared personal property of both Dominion and CL&P - \$16.9M and \$9.8M respectively, accounted for the bulk of this year's net personal property increase. The motor vehicle list included 682 fewer vehicles this year, primarily as a result of the DMV's extension on vehicle registration renewals. Despite the vehicle count decrease the demand for used cards over the past year has resulted in either value retention or appreciation. Surrounding towns have reported similar rates of increase.

- The Grand List 2020 change in each component is the result of:
- Personal Property- Values increased by 3.60% led by changes made at the Millstone Nuclear Power Plant as well as personal property additions by CL&P.
- Real Estate- There was a 0.61% increase resulting from new construction and property improvements made town-wide.
- Motor Vehicle – The 2020 Grand List increased by 7.19%.

Component	2019	2020	% Change
Real Estate	\$ 2,323,381,208	\$ 2,337,585,637	0.61%
Personal Property	\$ 848,563,101	\$ 879,136,394	3.60%
Motor Vehicle	\$ 159,012,648	\$ 170,451,155	7.19%



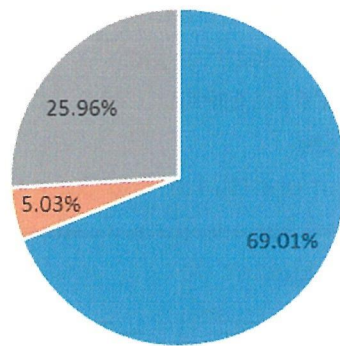
Distribution of Grand List

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

<u>2020 Grand List</u>		<u>2019 Grand List</u>	
Total Real Estate	69.01%	Total Real Estate	69.75%
Personal Property	25.96%	Personal Property	25.48%
Motor Vehicle	5.03%	Motor Vehicle	4.77%
Total	100.00%	Total	100.00%

Net Grand List Comparison 2019 to 2020						
Category	2019 Grand List AFTER BAA & COCs	2020 Grand List PRE BAA	2020 Grand List Post BAA	\$ VARIANCE	% VARIANCE	% GRAND LIST
Net Real Estate						
Residential	\$ 1,487,296,141	\$ 1,500,100,920	\$ 1,499,675,200	\$ 12,379,059	0.83%	44.28%
Commercial	\$ 821,440,373	\$ 822,778,423	\$ 822,647,753	\$ 1,207,380	0.15%	24.29%
Industrial	\$ 334,150,890	\$ 339,794,190	\$ 339,794,190	\$ 5,643,300	1.69%	10.03%
Total Gross Real Estate	\$ 2,642,887,404	\$ 2,662,673,533	\$ 2,662,117,143	\$ 19,229,739	0.73%	78.59%
Exemptions	\$ (319,506,196)	\$ (324,531,506)	\$ (324,531,506)	\$ 5,025,310	1.57%	
Total Net Real Estate	\$ 2,323,381,208	\$ 2,338,142,027	\$ 2,337,585,637	\$ 14,204,429	0.61%	69.01%
Personal Property	\$ 875,070,820	\$ 908,098,600	\$ 907,920,160	\$ 32,849,340	3.75%	26.80%
Exemptions	\$ (26,507,719)	\$ (28,783,766)	\$ (28,783,766)	\$ 2,276,047	8.59%	
Total Net Personal Property	\$ 848,563,101	\$ 879,314,834	\$ 879,136,394	\$ 30,573,293	3.60%	25.95%
Motor Vehicles	\$ 161,228,498	\$ 172,797,105	\$ 172,797,105	\$ 11,568,607	7.18%	5.10%
Exemptions	\$ (2,215,850)	\$ (2,345,950)	\$ (2,345,950)	\$ 130,100	5.87%	
Total Net Motor Vehicles	\$ 159,012,648	\$ 170,451,155	\$ 170,451,155	\$ 11,438,507	7.19%	5.03%
Total Net Grand List	\$ 3,330,956,957	\$ 3,387,908,016	\$ 3,387,173,186	\$ 56,216,229	1.69%	100.00%

Distribution of GL



■ Real Estate ■ Motor Vehicle ■ Personal Property

Top Ten Taxpayers Grand List 2020 RE/PP & Combined

REAL ESTATE	Net Assessed Value
Dominion Energy Nuclear CT Inc. MP#3	\$ 251,115,933
Dominion Energy Nuclear Connecticut Inc.	\$ 128,384,860
Dominion Energy Nuclear CT Inc MP#2	\$ 71,675,493
Crystal Mall LLC (Mall Stores)	\$ 30,690,018
Centro GA Waterford Commons (Waterford Commons Plaza)	\$ 29,145,260
Chase Crossroads Waterford Square (Crossroads Plaza)	\$ 13,976,930
Mass Municipal Wholesale Electric Co	\$ 12,530,097
Wal-Mart Real Estate Business Trust	\$ 12,283,794
VTR Northeast Holdings LLC	\$ 11,815,950
Charter Oak Federal Credit Union	\$ 11,307,540
PERSONAL PROPERTY	Net Assessed Value
Dominion Energy Nuclear Connecticut Inc	\$ 681,321,128
Connecticut Light & Power Company dba Eversource	\$ 98,709,340
Mass Municipal Wholesale Electric Co	\$ 13,568,660
Yankee Gas Services Co	\$ 12,003,080
Green Mountain Power Corp	\$ 4,890,376
Coca Cola Bott Southeastern NE	\$ 2,410,650
WG Crossroads Place LLC	\$ 2,398,690
Constitution Eye Surgery Ctr East LC	\$ 2,196,060
Sonalysts Inc	\$ 2,006,850
COMBINED	Net Assessed Value
Dominion Energy Nuclear Connecticut	\$ 1,133,197,408
Connecticut Light & Power Co. dba Eversource	\$ 98,709,340
Crystal Mall LLC (Mall Stores)	\$ 30,690,018
Centro GA Waterford Commons (Waterford Commons Plaza)	\$ 29,145,260
Mass Municipal Wholesale Electric	\$ 26,098,759
Chase Crossroads Waterford Square (Crossroads Plaza)	\$ 13,976,930
Charter Oak Federal Credit Union	\$ 13,547,160
Sonalysts Inc.	\$ 12,606,480
Wal-Mart Real Estate Business Trust	\$ 12,283,794
Yankee Gas Services Co.	\$ 12,003,080

Assessment Administration

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

In total the Board heard 31 appeals and made 21 changes. The Board chose to hear appeals for commercial and industrial properties with assessed values over \$1M and made 0 changes to properties in this category.

Total BAA 2020 GL reductions by category

	# Appeals	# Changes	# No Changes	Total Reductions
Real Estate	16	10	6	-\$556,390.00
Personal Property	15	11	4	-\$178,440.00
Motor Vehicle	0	0	0	\$0.00
	<u>31</u>	<u>21</u>	<u>10</u>	<u>-\$734,830.00</u>
Not Heard				
Incomplete/Late Filings	1			
Total Not Heard	<u>1</u>			

Real Estate:

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

Transfers of real estate title for tax billing and ownership records are processed on an ongoing basis in the Assessor's Office. From October 2020 through September 2021 a total of 1177 changes to title were processed.

Number of Documents	Q1	Q2	Q3	Q4	YTD Totals
Transfers ≥ \$2,000	179	119	183	161	642
Change or Transfer \$0	130	126	140	139	535
Transaction Totals	309	245	323	300	1177

The Assessor's office is required to maintain accurate GIS/tax maps and process updates accordingly. Working with Tighe & Bond the Assessor's office initiated a total of 34 map changes for the 2020 Grand List.

Staff members have processed a total of 1,870 building permits this year, verifying and valuing those that reflect property improvements and changes of use.

Income and Expense forms were mailed on March 15, 2021 to all owners of income producing real estate. The deadline to file the 2020 I&E forms was June 1st, 2021. Staff collected returned forms for further analysis by the Assessor and commercial appraisers with Vision Government Solutions Inc. to establish economic income data relevant to the 2022 state-mandated revaluation.

The upcoming 2022 town-wide revaluation commenced in March with the mailing and collection of data mailers to all residential property owners. Phase II of the revaluation is currently underway as data collectors with Vision Government Solutions Inc. began actively measuring and listing residential properties in October 2021.

The revaluation project will progress with additional residential and commercial property measure and list field visits in the spring of 2022. Vision Government Solutions Inc. will also be visiting properties through early fall 2022 to reflect value changes resulting from building permits issued between 10/1/2021 through 09/30/2022.

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

Personal Property:

New business accounts were discovered utilizing advertisements, internet and Connecticut Secretary of State searches, a physical canvass of the town, and trade name certificates that are placed on file with the Town Clerk's office.

An online electronic personal property filing process was instituted again this year for the 2021 Grand List which is currently in process. Cost savings realized by sending out online filing notices to business personal property owners as opposed to mailing 4-page declarations is estimated at approximately \$500. 25% of all active personal property accounts have been filed electronically for the 2021 Grand List now in progress.

The electronic filing system has thus far proven to increase processing efficiency within the Assessor's office while also providing taxpayers with a user-friendly system and secure access to individual prior year filings. The Assessor's office will continue to provide taxpayers with the option to file online

The following reports were filed with various state departments:

Office of Policy & Management:	Date Filed
M37 – State owned real property	3/9/2021
M37 C& H – Colleges & Hospitals	3/9/2021
M13 & M13A – Taxable & Exempt Property	3/31/2021
M65 – Manufacturing, Machinery & Equipment	4/1/2021
Veteran's Affairs Report	5/24/2021
DEP-F490 – Annual Report to State Forester	6/5/2021
M42B – Totally Disabled	6/7/2021
M35B – Reimbursement Request – Homeowners Benefit	6/10/2021
M59A – Additional Veterans Report	7/8/2021
M35P – Reduction to Homeowners' Reimbursement	9/7/2021

ton

Diane Vitagliano <dvitaglano@eltownhall.com>

Monday, October 05, 2020 1:42 PM

Melinda R. Kronfeld; Assessor; Paige Walton

Invoice from the Day for the Joint ad

0711_001.pdf

Subject:

Attachments:

Follow Up Flag:

Flag Status:

Follow up

Flagged

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,

Hope all are well. Attached is the invoice for the Joint Ad. It certainly is nice to be able to split it 4 ways. That is \$214.87 each.

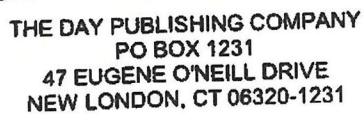
Thank you

Diane Vitagliano

Diane Vitagliano, CCMAII
Assessor East Lyme
860-691-4107

\$ 857.55 / 4 =

\$ 214.39
==



ACCOUNT NUMBER		CUSTOMER		BILLING PERIOD	
D140217		EAST LYME ASSESSORS		09/01/20-09/30/20	
Client			PAGE NUMBER		DUE DATE
			Page 1 of 1		10/31/20
CURRENT		OVER 30 DAYS		60 AND OVER	
\$ 857.55		\$ 0.00		\$ 0.00	
				TOTAL DUE	
				\$ 857.55	

EAST LYME ASSESSORS
PO BOX 519
NIANTIC, CT 06357

Is your digital marketing really working? For a FREE comprehensive digital audit call Aaron Witko at 860-701-4332 today!

CHECK NUMBER
AMOUNT PAID

THANK YOU FOR YOUR BUSINESS!
PLEASE RETURN UPPER PORTION WITH YOUR REMITTANCE

[illegible]

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

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

Accounting Fax
Advertising Fax
Classified Fax

860-437-7504
860-437-8780
860-442-5443

BILLING PERIOD		ACCOUNT NUMBER	CUSTOMER/CLIENT	
09/01/20-09/30/20		D140217	EAST LYME ASSESSORS	
CURRENT DUE	OVER 30 DAYS	60 AND OVER	TOTAL DUE	
\$ 857.55	\$ 0.00	\$ 0.00	\$ 857.55	

Payment Terms - Net End of Month **A FINANCE CHARGE OF 1.5% PER MONTH** ON ACCOUNTS NOT PAID WITHIN THE MONTH FOLLOWING PUBLICATION



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

ACCOUNT NUMBER	CUSTOMER	BILLING PERIOD
D93229	WATERFORD - TOWN OF/ ASSESSORS	01/01/20-01/31/20

Client		PAGE NUMBER	DUE DATE
		Page 1 of 1	2/29/20
CURRENT	OVER 30 DAYS	60 AND OVER	TOTAL DUE
\$ 123.90	\$ 0.00	\$ 0.00	\$ 123.90

WATERFORD - TOWN OF/ ASSESSORS
15 ROPE FERRY RD
WATERFORD, CT 06385

Is your digital marketing really working? For a FREE comprehensive digital audit call Aaron Witko at 860-701-4332 today!

CHECK NUMBER

AMOUNT PAID

THANK YOU FOR YOUR BUSINESS!
PLEASE RETURN UPPER PORTION WITH YOUR REMITTANCE

DATE	DESCRIPTION	PUBLICATIONS	REFERENCE # / PO #	SIZE/LINES or QTY	GROSS AMOUNT	OTHER	NET AMOUNT
01/23/20	Previous Balance						\$0.00
	853720 LEGAL TOWN OF WATERFC	DAY,DWB	D00853720	2 Col X 21 Lines			\$123.90
APPROVED VENDOR# <u>157</u> PO# <u>✓</u> FY <u>2020</u> CLOSE PO Y <u>✓</u> N <u> </u> ACCOUNT # <u>10104-52010</u> AMOUNT <u>123.90</u> SIGN <u>[Signature]</u> DATE <u>2/6/2020</u>							

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

860-442-2200
800-582-8296
800-542-3354

Accounting Fax
Advertising Fax
Classified Fax

860-437-7504
860-437-8780
860-442-5443

BILLING PERIOD	ACCOUNT NUMBER	CUSTOMER/CLIENT	
01/01/20-01/31/20	D93229	WATERFORD - TOWN OF/ ASSESSORS	
CURRENT DUE	OVER 30 DAYS	60 AND OVER	TOTAL DUE
\$ 123.90	\$ 0.00	\$ 0.00	\$ 123.90

Payment Terms - Net End of Month A FINANCE CHARGE OF 1.5% PER MONTH ON ACCOUNTS NOT PAID WITHIN THE MONTH FOLLOWING PUBLICATION

Paige Walton

From: Diane Vitagliano <dvitagliano@eltownhall.com>
Sent: Thursday, August 19, 2021 1:52 PM
To: Melinda R. Kronfeld; Paige Walton; Debra Yeomans
Subject: September Joint meeting add
Attachments: September Legal 2021.docx

**CAUTION: This email originated from outside of the organization.
Do not click links or open attachments unless you recognize the sender's email address and know the
content is safe.**

Hi All,

Will you please take a minute when you get a chance to review the joint add. I will send it off to the newspaper for a quote the end of next week.

Thanks
Diane

Diane Vitagliano

Diane Vitagliano, CCMAII
Assessor East Lyme
860-691-4107

Legal Notice
Towns of EAST LYME, LYME, OLD LYME AND
WATERFORD, CT
Filing of Tax Lists for 10/1/2021 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, 2021.

Disabled Veterans: Veterans claiming disability exemptions for the **first time** must submit proof from the Veterans Administration to the Assessor during the Assessment period stating the percentage of disability in order to receive the proper amount of exemption on the **2021** Grand List. All others need only file if their percentage of disability changed since 10/1/2020

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 at the 100% disability rating. If you qualify and are not receiving such exemption, provide proof of age to the Assessor.

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

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 10/1/2021 Grand List.

Farmers: Applications for exemption on farm machinery must be filed with the Assessor during the month of October, 2021.

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, 2021 and November 1, 2021 for the 10/1/2021 Grand List. Contact the Assessor's office for details

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

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

For the purpose of fulfilling the above obligations:

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

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

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

Dated this August 19, 2021

Diane Vitagliano
Assessor
Town of East Lyme, CT

Melinda Kronfeld
Assessor
Town of Lyme & Old Lyme

Debra A. Yeomans
Assessor
Town of Lyme, CT

Paige S. Walton
Assessor
Town of Waterford, CT



STATE OF CONNECTICUT
DEPARTMENT OF MOTOR VEHICLES
60 State Street, Wethersfield, CT 06161
ct.gov/dmv (860) 263-5700



Invoice

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

DATE	INVOICE #
5/28/2021	3691

DESCRIPTION	QTY	AMOUNT
-- PAYMENT DUE UPON RECEIPT --		
PERIOD COVERED: 7/01/21 TO 06/30/22		
YEARLY BILL FOR ONLINE ACCESS TO MOTOR VEHICLE INFORMATION. (DMV DIRECT PROGRAM)	1	250.00
* YOU ARE RESPONSIBLE FOR PAYMENT UNTIL YOU WITHDRAW FROM THE PROGRAM OR YOU HAVE BEEN NOTIFIED OF TERMINATION BY DMV		
PLEASE CONTACT THE FISCAL OFFICE AT 860-263-5269 WITH ANY QUESTIONS.		
PLEASE REMIT THE TOTAL DUE TO:		
DEPARTMENT OF MOTOR VEHICLES 3RD FLOOR/FISCAL SERVICES RM 327 60 STATE STREET WETHERSFIELD, CT 06161		
APPROVED		
VENDOR# _____		
PO# _____ FY <u>2022</u>		
CLOSE PQ Y _____ N _____		
ACCOUNT # <u>10104-52030</u>		
AMOUNT <u>\$250.00</u>		
SIGN <u>[Signature]</u>		
DATE <u>06/04/2021</u>		
Please return one copy of invoice with payment.		Total \$250.00
		Payments/Credits \$0.00
		Balance Due \$250.00

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:		
CUSTOMER INFORMATION						
CUSTOMER	Full Legal Name: WATERFORD, TOWN OF				Phone:	
	Billing Address: 15 Rope Ferry Road				Contact Name: Rawle Dummett	
	City: WATERFORD	State: CT	Zip Code:	Contact Email: rdummett@waterfordct.org		
EQUIPMENT	QTY	MODEL and DESCRIPTION	MONTHLY IMAGE ALLOWANCE*		EXCESS IMAGE CHARGE**	
	1	XEROX C8045	B&W	COLOR	B&W	COLOR
			1,000	0	.006	.06
Meter Billing Frequency (Monthly unless checked): ☐ (Other)			* Included in Base Payment ** Plus applicable taxes			
Initial Term: 63 (in months)			Base Payment (plus applicable taxes): \$158.00			
Frequency: ☒ Monthly ☐ Quarterly ☐ Annually			Equipment Location (if different from Billing Address): 24 Rope Ferry Road			
CUSTOMER ACCEPTANCE						
BY YOUR SIGNATURE BELOW, YOU ACKNOWLEDGE THAT YOU ARE ENTERING INTO A NON-CANCELLABLE AGREEMENT AND THAT YOU HAVE READ AND AGREED TO ALL APPLICABLE TERMS AND CONDITIONS SET FORTH ON PAGES 1 AND 2 HEREOF.						
Authorized Signer: [Signature]			Date: [Signature]	Federal Tax ID # (Required): 06-2002121		
Print Name: Rawle Dummett			Title: Purchasing Agent			
SUPPLIER ACCEPTANCE						
Accepted By: Xerox Financial Services LLC			Name and Title:		Date:	
TERMS & CONDITIONS						

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

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

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

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

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

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

7. Equipment Delivery and Maintenance. You should arrange with Supplier to have the Equipment delivered to you at the location(s) specified herein, and you agree to execute a Delivery & Acceptance Certificate at XFS's request and confirm same via telephone and/or electronically confirming when you have received, inspected and irrevocably accepted the Equipment, and authorize XFS to fund Supplier for the Equipment. If you fail to accept the Equipment, you shall no longer have 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 EXCUSED BY ANY ALLEGED BREACH BY SUPPLIER.



MAINTENANCE AGREEMENT

ORDER/PACKETID

9052

Gary DelCoile

-BILLING INFORMATION-

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

-METER INFORMATION-

METER CONTACT: Rawle Dummett
METER EMAIL: rdummett@waterfordct.org
METER PHONE: 860/440 0540

-SHIPPING INFORMATION-

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

-IT INFORMATION-

IT CONTACT: _____
IT PHONE: _____
IT EMAIL: _____

	EQUIPMENT	MODEL	SERIAL
Xerox		C8045	

Maintenance and Supply

BASE CHARGE:	see lease	B/W COPIES INCLUDED:	1,000	B/W PRINTS INCLUDED:	
BASE BILLED BY:	CBS	COLOR COPIES INCLUDED:	0	COLOR PRINTS INCLUDED:	
A S Q M*					
PER COPY/RATES					
OVERAGES BILLED:	S	006	06	BILLED BY:	CBS
A S Q M*					
COPIES PRINTS					
COPY MINIMUM REQUIRED ON ALL 45 PMM 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
ACCEPTED BY: _____
TITLE: _____
DATE: _____

CUSTOMER NAME: TOWN OF WATERFORD
ACCEPTED BY: RAWLE DUMMETT
TITLE: PURCHASING AGENT
DATE: 11/20/19

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

At this time, I decline Maintenance Agreement Coverage. Initials: _____

8. **Meter Readings and Annual Adjustments.** You agree that Meter Reading submittal is covered by the Maintenance Agreement. At any time after 12 months from the Commencement Date and for each successive 12 month period thereafter during the Term, XFS may increase your Base Payment and the Excess Charges by a maximum of fifteen percent (15%) of the then-current Base Payment therefor and you agree to pay such increased amounts.

9. **Equipment Ownership, Labeling and UCC Filing.** If and to the extent a court deems this Agreement to be a security agreement under the UCC, and otherwise for precautionary purposes only, you grant XFS a first priority security interest in your interest in the Equipment as defined on the first page hereof in order to secure your performance hereunder. XFS is and shall remain the sole owner of the Equipment, except the Software. You authorize XFS to file a UCC financing statement to show, and to do all other acts to protect, our interest in the Equipment. You agree to pay any filing fees and administrative costs for the filing of such financing statements. You agree to keep the Equipment free from any liens or encumbrances and to promptly notify XFS if there is any change in your organization such that a re-filing or amendment to XFS's financing statement against you becomes necessary.

10. **Assignment.** YOU MAY NOT ASSIGN, SELL, PLEDGE, TRANSFER, SUBLEASE OR PART WITH POSSESSION OF THE EQUIPMENT, THIS AGREEMENT OR ANY OF YOUR RIGHTS OR OBLIGATIONS UNDER THIS AGREEMENT (COLLECTIVELY "ASSIGNMENT") WITHOUT XFS'S PRIOR WRITTEN CONSENT, WHICH SHALL NOT BE UNREASONABLY WITHHELD, BUT SUBJECT TO THE SOLE DISCRETION OF XFS'S REASONABLE CREDIT DISCRETION AND EXECUTION OF ANY NECESSARY ASSIGNMENT DOCUMENTATION. If XFS agrees to an Assignment, you agree to pay the applicable assignment fee and reimburse XFS for any costs we incur in connection with that Assignment, which in the aggregate shall not exceed \$250. XFS may sell, assign or transfer all or any part of the Equipment, this Agreement and/or any of our rights (but none of our obligations except for invoicing and tax administration) hereunder. XFS's assignee will have the same rights that we have to the extent assigned. YOU AGREE NOT TO ASSERT AGAINST SUCH ASSIGNEE ANY CLAIMS, DEFENSES, COUNTERCLAIMS, RECOUPMENTS, OR SET-OFFS THAT YOU MAY HAVE AGAINST XFS, and you agree to remit Payments to such Assignee if so designated. XFS agrees and acknowledges that any Assignment by us will not materially change your obligations hereunder.

11. **Taxes.** You will be responsible for, indemnify and hold XFS harmless from, all applicable taxes, fees or charges (including sales, use, personal property and transfer taxes (other than net income taxes), plus interest and penalties) assessed by any governmental entity on you, the Equipment, this Agreement, or the amounts payable hereunder (collectively, "Taxes"), which will be included in XFS's invoices to you unless you timely provide continuing proof of your tax exempt status. Regardless of your tax-exempt status, XFS reserves the right to pass through, and you agree to pay, any such Taxes that are actually assessed by the applicable State on XFS as lessor of the Equipment. For jurisdictions where certain taxes are calculated and paid at the time of agreement initiation, you authorize XFS to finance and adjust your Base Payment to include such Taxes over the Term. Unless and until XFS notifies you in writing to the contrary, the following shall apply to personal property taxes and returns. XFS will file all personal property tax returns covering the Equipment, pay the personal property taxes levied or assessed thereon, and collect from your account all such personal property taxes. XFS MAKES NO WARRANTY, EXPRESS OR IMPLIED, REGARDING THE TAX OR ACCOUNTING TREATMENT OF THIS AGREEMENT.

12. **Equipment Warranty Information and Disclaimers.** XFS HAS NO INVOLVEMENT IN THE DESIGN, MANUFACTURE, SALE, DELIVERY, INSTALLATION, USE OR MAINTENANCE OF THE EQUIPMENT. THEREFORE, XFS DISCLAIMS, AND YOU WAIVE SOLELY AGAINST XFS, ALL EQUIPMENT WARRANTIES, EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, NON-INFRINGEMENT AND FITNESS FOR PARTICULAR PURPOSE, AND XFS MAKES NO REPRESENTATIONS WHATSOEVER, INCLUDING, BUT NOT LIMITED TO, THE EQUIPMENT'S SUITABILITY, FUNCTIONALITY, DURABILITY OR CONDITION. Since you have selected the Equipment and Supplier, you acknowledge that you are aware of the name of the manufacturer of each item of Equipment, Supplier's contact information, and agree that you will contact manufacturer and/or Supplier for a description of any warranty rights you may have under the Equipment supply contract, sales order, or otherwise. Provided you are not in default hereunder, XFS hereby assigns to you any Equipment warranty rights we may have against Supplier or manufacturer thereof. If the Equipment is returned to XFS or you are in default, such rights are deemed reassigned by you to XFS. IF THE EQUIPMENT IS NOT PROPERLY INSTALLED, DOES NOT OPERATE AS WARRANTED, BECOMES OBSOLETE, OR IS UNSATISFACTORY FOR ANY REASON, YOU SHALL MAKE ALL RELATED CLAIMS SOLELY AGAINST MANUFACTURER OR SUPPLIER AND NOT AGAINST XFS, AND YOU SHALL NEVERTHELESS CONTINUE TO PAY ALL PAYMENTS AND OTHER SUMS PAYABLE UNDER THIS AGREEMENT.

13. **Liability and Indemnification.** XFS IS NOT RESPONSIBLE FOR ANY LOSSES, DAMAGES, EXPENSES OR INJURIES OF ANY KIND OR TYPE, INCLUDING, BUT NOT LIMITED TO, ANY SPECIAL, INDIRECT, INCIDENTAL, CONSEQUENTIAL OR PUNITIVE DAMAGES (COLLECTIVELY, "CLAIMS") TO YOU OR ANY THIRD PARTY CAUSED BY THE EQUIPMENT OR ITS USE. You assume the risk of liability for, and hereby agree to indemnify and hold safe and harmless, and covenant to defend, XFS, its employees, officers and agents from and against: (a) any and all Claims (including legal expenses of every kind and nature) arising out of the acceptance or rejection, ownership, leasing, possession, operation, use, return or other disposition of the Equipment; and (b) any and all loss or damage of or to the Equipment. Neither sentence in this Section shall apply to Claims arising directly and proximately from XFS's gross negligence or willful misconduct.

14. **Default and Remedies.** You will be in default hereunder if XFS does not receive any Payment within 10 days after its due date, or you breach any other material obligation hereunder or any other agreement with XFS. If you default, and such default continues for 10 days after XFS provides notice to you, XFS may, in addition to other remedies (including disabling or repossessing the Equipment and/or requesting Supplier to cease performing under the Maintenance Agreement), immediately require you to do one or more of the following: (a) as liquidated damages for loss of bargain and not as a penalty, pay the sum of (i) all amounts then past due, plus interest from the due date until paid at the rate of 1.5% per month; (ii) the Payments remaining in the Term (including the fixed maintenance component thereof, if permitted under the Maintenance Agreement), discounted at the Discount Rate to the date of default; (iii) the Equipment's booked residual; and (iv) Taxes; and (b) require you to return the Equipment as provided in Sections 5 and 6 hereof. You agree to pay all reasonable costs, including attorneys' fees and disbursements, incurred by XFS to enforce this Agreement.

15. **Risk of loss and insurance.** You assume and agree to bear the entire risk of loss, theft, destruction or other impairment of the Equipment upon delivery. You, at your own expense, (i) shall keep Equipment insured against loss or damage at a minimum of full replacement value thereof; and (ii) shall carry liability insurance against bodily injury, including death, and against property damage in the amount of at least \$2 million (collectively, "Required Insurance"). All such Equipment loss/damage insurance shall be with lender's loss payable to "XFS, its successors and/or assigns, as their interests may appear," and shall be with companies reasonably acceptable to XFS. XFS shall be named as an additional insured on all liability insurance policies. The Required Insurance shall provide for 30 days' prior notice to XFS of cancellation.

YOU MUST PROVIDE XFS OR OUR DESIGNEES WITH SATISFACTORY WRITTEN EVIDENCE OF REQUIRED INSURANCE WITHIN 30 DAYS OF THE ACCEPTANCE DATE AND ANY SUBSEQUENT WRITTEN REQUEST BY XFS OR OUR DESIGNEES. IF YOU DO NOT DO SO, THEN IN LIEU OF OTHER REMEDIES FOR DEFAULT, XFS IN OUR DISCRETION AND AT OUR SOLE OPTION MAY (BUT IS NOT REQUIRED TO) OBTAIN INSURANCE FROM AN INSURER OF XFS'S CHOOSING, WHICH MAY BE AN XFS AFFILIATE, IN SUCH FORMS AND AMOUNTS AS XFS DEEMS REASONABLE TO PROTECT XFS'S INTERESTS (COLLECTIVELY "EQUIPMENT INSURANCE"). EQUIPMENT INSURANCE WILL COVER THE EQUIPMENT AND XFS; IT WILL NOT NAME YOU AS AN INSURED AND MAY NOT COVER ALL OF YOUR INTEREST IN THE EQUIPMENT AND WILL BE SUBJECT TO CANCELLATION AT ANY TIME. YOU AGREE TO PAY XFS PERIODIC CHARGES FOR EQUIPMENT INSURANCE (COLLECTIVELY "INSURANCE CHARGES") THAT INCLUDE: AN INSURANCE PREMIUM THAT MAY BE HIGHER THAN IF YOU MAINTAINED THE REQUIRED INSURANCE SEPARATELY; A FINANCE CHARGE OF UP TO 1.5% PER MONTH ON ANY ADVANCES MADE BY XFS OR OUR AGENTS; AND COMMISSIONS, BILLING AND PROCESSING FEES; ANY OR ALL OF WHICH MAY GENERATE A PROFIT TO XFS OR OUR AGENTS. XFS MAY ADD INSURANCE CHARGES TO EACH PAYMENT. XFS shall discontinue billing or debiting Insurance Charges for Equipment Insurance upon receipt and review of satisfactory evidence of Required Insurance.

You must promptly notify XFS of any loss or damage to Equipment which makes any item of Equipment unfit for continued or repairable use. You hereby irrevocably appoint XFS as your attorney-in-fact to execute and endorse all checks or drafts in your name to collect under any such Required Insurance. Insurance proceeds from Required Insurance or Equipment Insurance received shall be applied, at XFS's option, to (a) restore the Equipment so that it is in the same condition as when delivered to you (normal wear and tear excepted), or (b) if the Equipment is not restorable, to replace it with like-kind condition Equipment from the same manufacturer, or (c) pay to XFS the greater of (i) the total unpaid Payments for the entire Term hereof (discounted to present value at the Discount Rate) plus XFS's residual interest in such Equipment (before agreed to be sold to the Equipment's original cost to XFS) plus any amounts due to XFS hereunder, or (ii) the Determined FV immediately prior to the loss or damage. NO LOSS OR DAMAGE TO EQUIPMENT, OR XFS'S RECEIPT AND APPLICATION OF INSURANCE PROCEEDS, SHALL RELIEVE YOU OF ANY OF YOUR REMAINING OBLIGATIONS UNDER THIS AGREEMENT. Notwithstanding procurement of Equipment Insurance or Required Insurance, you remain primarily liable for performance under this Section in the event the applicable insurance carrier fails or refuses to pay any claim. YOU AGREE (i) AT XFS'S SOLE ELECTION TO ARBITRATE ANY DISPUTE WITH XFS, OUR AGENTS OR ASSIGNS REGARDING THE EQUIPMENT INSURANCE UNDER THE RULES OF THE AMERICAN ARBITRATION ASSOCIATION IN FAIRFIELD COUNTY, CT, (ii) THAT IF XFS MAKES THE FOREGOING ELECTION ARBITRATION (NOT A COURT) SHALL BE THE EXCLUSIVE REMEDY FOR SUCH DISPUTES; AND (iii) THAT CLASS ARBITRATION IS NOT PERMITTED. This arbitration option does not apply to any other provision of this Agreement.

16. **Finance Lease and Customer Waivers.** The parties agree this Agreement shall be construed as a "Finance lease" under UCC Article 2A. Customer waives its rights as a lessee under UCC 2A Sections 508-522.

17. **Authorization of Signer and Credit Review.** You represent that you may lawfully enter into, and perform, this Agreement, that the individual signing this Agreement on your behalf has all necessary authority to do so, and that all financial information you provide accurately represents your financial condition. You agree to furnish financial information that XFS may request now, including your Federal Tax ID, and you authorize XFS to obtain credit reports on you in the future should you default or fail to make prompt payments hereunder.

18. **Original and Sole Controlling Document; No Modifications Unless in Writing.** This Agreement constitutes the entire agreement between the Parties as to the subjects addressed herein, and representations or statements not included herein are not part of this Agreement and are not binding on the Parties. You agree that an executed copy of this Agreement that is signed by your authorized representative and by XFS's authorized representative (an original manual signature or such signature reproduced by means of a reliable electronic form, such as electronic transmission of a facsimile or electronic signature) shall be marked "original" by XFS and shall constitute the only original document for all purposes. To the extent this Agreement constitutes UCC chattel paper, no security interest in this Agreement may be created except by the possession or transfer of the copy marked "original" by XFS. IF A PURCHASE ORDER OR OTHER DOCUMENT IS ISSUED BY YOU, NONE OF ITS TERMS AND CONDITIONS SHALL BE BINDING ON XFS, AS THE TERMS AND CONDITIONS OF THIS AGREEMENT EXCLUSIVELY GOVERN THE TRANSACTION DOCUMENTED HEREIN. SUPPLIER AND ITS REPRESENTATIVES ARE NOT OUR AGENTS AND ARE NOT AUTHORIZED TO MODIFY OR NEGOTIATE THE TERMS OF THIS AGREEMENT. THIS AGREEMENT MAY NOT BE AMENDED OR SUPPLEMENTED EXCEPT IN A WRITTEN AGREEMENT SIGNED BY AUTHORIZED REPRESENTATIVES OF THE PARTIES AND NO PROVISIONS CAN BE WAIVED EXCEPT IN A WRITING SIGNED BY XFS. You authorize XFS to insert or correct missing information on this Agreement, including but not limited to your proper legal name, agreement numbers, serial numbers and other Equipment information, so long as there is no material impact to your financial obligations.

19. **Governing Law, Jurisdiction, Venue and JURY TRIAL WAIVER.** THIS AGREEMENT IS GOVERNED BY, AND SHALL BE CONSTRUED IN ACCORDANCE WITH, THE LAWS OF THE STATE OF CONNECTICUT. THE JURISDICTION AND VENUE OF ANY ACTION TO ENFORCE THIS AGREEMENT, OR OTHERWISE RELATING TO THIS AGREEMENT, SHALL BE IN A FEDERAL OR STATE COURT IN FAIRFIELD COUNTY, CONNECTICUT OR, EXCLUSIVELY AT XFS'S OPTION, IN ANY OTHER FEDERAL OR STATE COURT WHERE THE EQUIPMENT IS LOCATED OR WHERE XFS'S OR YOUR PRINCIPAL PLACES OF BUSINESS ARE LOCATED, AND YOU HEREBY WAIVE ANY RIGHT TO TRANSFER VENUE. THE PARTIES HEREBY WAIVE ANY RIGHT TO TRIAL BY JURY IN ANY ACTION RELATED TO OR ARISING OUT OF THIS AGREEMENT.

20. **Miscellaneous.** Your obligations under the "Taxes" and "Liability" Sections commence upon execution, and survive the expiration or earlier termination, of this Agreement. Notices hereunder must be in writing. Notices to you will be sent to the "Billing Address" provided on the first page hereof, and notices to XFS shall be sent to our address provided on the first page hereof. Notices will be deemed given 5 days after mailing by first class mail or 2 days after sending by nationally recognized overnight courier. Invoices are not considered notices and are not governed by the notice terms hereof. You authorize XFS to communicate with you by any electronic means (including cellular phone, email, automatic dialing and recorded messages) using any phone number (including cellular) or electronic address you provide to us. If a court finds any term of this Agreement unenforceable, the remaining terms will remain in effect. The failure by either Party to exercise any right or remedy will not constitute a waiver of such right or remedy. If more than one party has signed this Agreement as Customer, each such party agrees that its liability is joint and several. The following four sentences control over every other part of this Agreement. Both Parties will comply with applicable laws. XFS will not charge or collect any amounts in excess of those allowed by applicable law. Any part of this Agreement that would, but for the last four sentences of this Section, be read under any circumstances to allow for a charge higher than that allowed under any applicable legal limit, is modified by this Section to limit the amounts chargeable hereunder to the maximum amount allowed under the legal limit. If, in any circumstances, any amount in excess of that allowed by law is charged or received, any such charge will be deemed limited by the amount legally allowed and any amount received by XFS in excess of that legally allowed will be applied by us to the payment of amounts legally owed hereunder or refunded to you.

TERMS AND CONDITIONS

1. **SERVICES.** Throughout this Agreement the words "We," "Our," and "Us" refer to Company. The words "You" and "Your" refer to the Customer indicated on the reverse. This Agreement covers both the labor and materials for adjustments, repairs, and replacement of parts necessitated by normal use of the Equipment listed on the face of this Agreement ("Services"). Services do not include the following: (a) repairs due to (i) misuse, neglect, or abuse (including, without limitation, improper voltage or use of supplies that do not conform to the manufacturers' specifications), (ii) use of options, accessories, products, supplies not provided by Company; (iii) non-Company alterations, relocation, or service; (iv) loss or damage resulting from accidents, fire, water, or theft; (v) maintenance requested outside Company's normal business hours or this Agreement; (vi) relocation; (vii) software or connected hardware; (viii) hard drive replacement; (ix) Thermal heads, process units, and fuser units for Facsimile Machines; (x) Thermal Heads and MICR Toner for Laser Printers; and parts and labor for all non-laser printers, and/or (h) parts for Scanners/Document Feeders. Replacement parts may be new, reprocessed, or recovered. Supplies provided by Company are in accordance with the copy volumes set forth on the face of this Agreement and within the manufacturer's stated yields and do not include staples. Supplies are to be used exclusively for the Equipment and remain Company property until consumed. You will return, or allow Company to retrieve, any unused supplies at the termination/expiration of this Agreement. You are responsible for the cost of excess supplies. You authorize Equipment to be connected to automatic meter reading software and/or device or, if we otherwise request, you will provide us with accurate meter readings for each item of Equipment when and by such means as we request. If you do not permit the Company to use automatic meter reading software and/or devices, Company may charge a monthly fee for manually performing meter reads. If you do not provide meter reads as required, Company may estimate the reading and bill accordingly. You shall provide adequate space and electrical service for the operation of the Equipment in accordance with UL and/or manufacturer's specifications. Supplies will be via UPS Ground. All shipping methods, including, but not limited to, UPS Ground, Overnight, and/or Messenger Service, will be billed to the Customer. Additional fees may be charged for Services provided outside Company's normal business hours or for computer/network issues and will be at Company hourly rates in effect at the time of Service. If at any time during the Term of this Agreement, Customer upgrades, modifies, or adds equipment, Customer shall promptly notify Company and provide Company right of first refusal to provide Services for added equipment. Company maintains the right to inspect any upgrades and modifications to Equipment and/or additional equipment and, in its sole discretion, determine whether equipment is eligible for Service. If approved, the Agreement will be amended to include such changes, including pricing modifications. Unless otherwise agreed to in writing, Customer remains solely responsible for any and all Customer data stored within the Equipment and the removal of such data upon removal of Equipment or termination of this Agreement.

2. **TERM AND PAYMENT.** Except as otherwise provided for herein, this Agreement in non-cancelable and will commence on the start date indicated on the face of this Agreement and remain in effect throughout the Term. In the event the fees herein are included in your lease payment, the Term shall begin on the start date and continue through the expiration/termination of the Lease Agreement. The meter count at installation or, in the case of owned printers, at assessment, will be used for overages calculations. Unless notified in writing sixty (60) days prior to its expiration, this Agreement shall automatically renew for additional one (1) year periods. You agree to pay Company the Minimum Monthly Payment and all other sums when due and payable. The Minimum Monthly Payment entitles you to Services for a specific number and type (i.e. black, white, color, scan) of Prints/Copies as identified on the face of this Agreement and will be billed in advance. In addition, You agree to pay the Overage Rate for each Print/Copy that exceeds the applicable number and type of Prints/Copies provided in the Minimum Monthly Payment which amount shall be billed in arrears and is payable as indicated on the face of this Agreement. A Print/Copy is defined as standard 8.5"x11" copy (larger size copies may register two meter clicks). No credit will be applied towards unused copies/prints. Your obligation to pay all sums when due shall be absolute and unconditional and is not subject to any abatement, offset, defense or counterclaim. If any payment is not paid within 10 days of its due date, you will pay a late charge not to exceed 7% of each late payment (or such lesser rate as is the maximum allowable by law).

Company has the right to withhold service and supplies, without recourse, for any non-payment. Unless otherwise stated on the face of this Agreement, Company may increase the Base Charge and/or the Overage Rates on an annual basis, in an amount not to exceed 15%. Company retains the right to have all or some of the amounts due hereunder billed and/or collected by third parties. If Customer requires any specialized billing procedure or invoicing, Company reserves the right to bill an administrative fee not to exceed \$100 per invoice.

3. **TAXES.** Payments are exclusive of all state and local sales, use, excise, privilege and similar taxes. You will pay when due, either directly or to Us upon demand, all taxes, fines and penalties relating to this Agreement that are now or in the future assessed or levied.

4. **WARRANTY:** You acknowledge that the Equipment covered by this Agreement was selected by You based upon your own judgment. COMPANY MAKES NO REPRESENTATIONS OR WARRANTIES, EXPRESS OR IMPLIED, ORAL OR WRITTEN, INCLUDING, WITHOUT LIMITATION, IMPLIED WARRANTIES OF NON-INFRINGEMENT; IMPLIED WARRANTIES OF MERCHANTABILITY; OR, FITNESS FOR A PARTICULAR PURPOSE, ALL OF WHICH ARE SPECIFICALLY AND UNRESERVEDLY EXCLUDED. IN PARTICULAR, BUT WITHOUT LIMITATION, NO WARRANTY IS GIVEN THAT EQUIPMENT IS SUITABLE FOR PURPOSES INTENDED BY CUSTOMER.

5. **LIMITATION OF LIABILITY.** In no event, shall Company be liable for any indirect, special, incidental or consequential damages (including loss profits) whether based in contract, tort, or any other legal theory and irrespective of whether Company has notice of the possibility of such damages.

6. **DEFAULT; REMEDIES:** Any of the following events or conditions shall constitute an Event of Default under this Agreement: (a) failure to make payment when due of any indebtedness to Company or for the Equipment, whether or not arising under this Agreement, without notice or demand by Company; (b) breach by you of any obligation herein, or (c) if you cease doing business as a going concern. If you default, Company may: (1) require future Services, including supplies to be paid in advance, (2) require you to immediately pay the amount of the remaining unpaid balance of the Agreement, (3) terminate any and all agreements with you, and/or (4) pursue any other remedy permitted at law or in equity. In the Event of Default, remaining payment amounts due will be calculated using the average of the last six months' billing periods or the face value of the Agreement, whichever is greater, multiplied by the remaining months of the Agreement. You agree that any delay or failure of Company to enforce its rights under this Agreement does not prevent Company from enforcing any such right at a later time. All of Company's rights and remedies survive the termination of this Agreement. In the event of a dispute arising out of this Agreement or the Equipment listed herein, should it prevail, Company shall be entitled to collection of its reasonable costs and attorneys' fees incurred in defending or enforcing this Agreement, whether or not litigation is commenced.

7. **ASSIGNMENT:** You may not sell, transfer, or assign this Agreement without the prior written consent of Company. Company may sell, assign or transfer this Agreement.

8. **NOTICES:** All notices required or permitted under this Agreement shall be by registered mail to such party at the address set forth in this Agreement, or at such other address as such party may designate in writing from time to time. Any notice from Company to you shall be effective three days after it has been deposited in the mail, duly addressed. All such notices to Company from you shall be effective after it has been received via registered U.S. Mail.

9. **INDEMNIFICATION.** You are responsible for and agree to indemnify and hold us harmless from, any and all (a) losses, damages, penalties, claims, suits and actions (collectively, "Claims"), whether based on a theory of contract, tort, strict liability of otherwise caused by or related to Your use or possession of the Equipment, and (b) all costs and attorneys' fees incurred by Us relating to such claim.

10. **FAX EXECUTION.** A faxed or electronically transmitted version of this Agreement may be considered the original and you will not have the right to challenge in court the authenticity or binding effect of any faxed or scanned copy or signature thereon. This Agreement may be signed in counterparts and all counterparts will be considered and constitute the same Agreement.

11. **MISCELLANEOUS.** (a) Choice of Law. This Agreement shall be governed by the laws of the state of _____, without regard to the conflict of laws or principles of such states; (b) Jury Trial. YOU EXPRESSLY WAIVE TRIAL BY JURY AS TO ALL ISSUES ARISING OUT OF OR RELATED TO THIS AGREEMENT; (c) Entire Agreement. This Agreement constitutes the entire agreement between the parties with regards to the subject matter herein and supersedes all prior agreements, proposals or negotiations, whether oral or written; (d) Enforceability. If any provision of this Agreement is unenforceable, illegal or invalid, the remaining provisions will remain in full force and effect; (e) Amendments. This Agreement may not be amended or modified except by a writing signed by the parties; provided you agree that we are authorized, without notice to you, to supply missing information or correct obvious errors provided that such change does not materially alter your obligations; (f) Force Majeure. Company shall not be responsible for delays or inability to service caused directly or indirectly by strikes, accidents, climate conditions, parts availability, unsafe travel conditions, or other reasons beyond our control; (g) Company has the right to modify/correct any clerical errors.

INITIAL

Manage Print Services Agreement 010115



PICK UP / MOVE FORM

ORDERPACKETID

9052

COMPANY NAME: Town Of Waterford

EQUIPMENT

EQ Make / Model	ID	S/N
Xerox 8405	AB7088	9H8363376

PICK UP INFORMATION / MOVE INFORMATION

- PICK UP INFORMATION -

COMPANY Town Of Waterford
ADDRESS 15 Rope Ferry Road
CITY WATERFORD STATE CT ZIP 06385
CONTACT Rawle Dummett
PHONE 860/440-0540

- MOVE TO INFORMATION -

Ⓢ MOVE TO CBS WAREHOUSE

COMPANY Town Of Waterford
ADDRESS 24 Rope Ferry Road
CITY WATERFORD STATE CT ZIP 06385
CONTACT Rawle Dummett
PHONE 860/440-0540

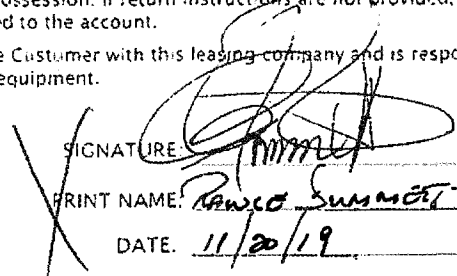
DISPOSITION OF EQUIPMENT

☒ **TRADE IN UNIT** Customer warrants that it is the sole owner of the equipment and that it is a free and clear of any liens, security interest and/or any other encumbrances and hereby releases all right and title to Connecticut Business Systems (CBS)

☐ **LEASING COMPANY UNIT** LEASE NUMBER _____

(LEASING COMPANY) is the owner of the unit and either:

- ☐ Customer is responsible for completing all financial obligations of the lease and sending cancellation notice with the request for return instructions. ENSURE NOTIFICATION IS TIMELY. Upon completion, Customer shall provide these instructions to CBS within 10 days of the lease payoff at which time CBS will return it to the leasing company. CBS shall not be responsible for any delay in returning the equipment nor any loss or damage while in its possession. If return instructions are not provided, within 10 days, the equipment will promptly be returned to the account.
- ☐ CBS is performing an equipment upgrade for the Customer with this leasing company and is responsible for the final lease obligations and return of the equipment.

SIGNATURE PRINT NAME: RAWLE DUMMETTDATE: 11/20/19

Gary DelColle

Monday, November 18, 2019



November 23, 2021

RE: 2022-23 Budget Letter/Quote Introduction

Over the past 10 years QDS has successfully controlled costs in lieu of inflationary pressures. We have always kept cost increases under 3%, and in fact, several years we had 0% increases.

Unfortunately, this year inflation has driven up costs dramatically. Cost of wages and employee benefits (to hire and retain the best programmers, managers, and support staff) as well as cost of materials, fuel and utilities have increased 6% - 8%.

For 2022-23 the average increase in software licensing, support and maintenance, IT services and printing and mailing services will be 5%. Customers with multi-year contractual obligations will not be subject to this increase but rather subject to the terms of their original agreement.

Over the past 40 years QDS has continuously reinvested into our people and products, to provide our customers with the best possible products and support. This principle we built the company on will never change. We have many exciting new products and services we will introduce in the 2022-23.

As always, we are grateful for your continued loyalty and support, wishing you safe and Happy Holidays.

Sincerely

Vincent Crudele, CEO

Leo DiNicola, CFO



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

Budget Letter 2022-23

Date	Letter/Quot...
12/3/2021	2020E4772

Name / Address

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

Contact	Natalina Swift
Phone #	2037559031 Ext 105
Fax #	203-574-4360
e-mail	nswift@qds.biz or leo@qds.biz
Cellphone #	203-910-2316

Description of Services

Software Services

Annual Software Support Fee - Assessor Software
Annual Subscription Fee - Personal Property CAMA
Annual Subscription Fee - QDS Hosted Personal Property Declaration Form
DRaaS - Disaster recovery as a service

Double Sided laser Printing & Indexing of Grand List - Regular - 2021
Permanently Binding Grand List Book(s) - Regular List - 2021
Double Sided laser Printing & Indexing of Grand List - MVS
Permanently Binding Grand List Book(s) - MVS

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

PP Declarations - Printing and Mailing Services

Printing, processing, and nesting personal property online letters.
#10 Window Mailing Envelopes 24# WW - 1 sided
CASI certify File
1st Class Postage - CASS Certified Rates
Subtotal

Subtotal CONTACTUAL SERVICES

OPTIONAL

Est Qty

Total

1

1

1

84

4

4

1

1

1

1,350

1,400

1

1,350

5,011.25

2,100.00

288.75

485.10

1,953.00

315.00

488.25

78.75

525.00

12,245.10

354.38

98.01

78.75

659.14

1,190.28

13,435.38

www.qds.biz

Grand Total

Review this letter carefully - call if
items need to be removed or added -
Sign and return promptly

Customer Acceptance Signature: _____

Print Name and Title: _____

Customer Acceptance Date: _____

PO #:

Enter Total based on options chosen

Connecticut Association of Assessing Officers
c/o Fauna Eller, Assessor's Office
505 Silas Deane Highway
Wethersfield, CT 06109-2280

Membership Invoice

Invoice # 2149

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

VENDOR# 69
PO# FY 2021
CLOSE PO Y N
ACCOUNT # 10104-52050
AMOUNT \$70.00
SIGN \$70.00 / [Signature]

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

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

MEMBER	ITEM	AMOUNT
Walton, Paige 1/1/2021 - 1/1/2022	Regular Member Membership Dues	70.00
FILE COPY		
TOTAL:		70.00

Payment Stub

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

CAAO
c/o Fauna Eller, Assessor's Office
505 Silas Deane Highway
Wethersfield, CT 06109-2280

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

Member: Walton, Paige

Invoice #: 2149
Description: Membership Dues
Date Due: 2/15/2021

Amt. Due: 70.00

Enclosed:



IAAO

INTERNATIONAL ASSOCIATION

of ASSESSING OFFICERS

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

Membership Dues

SECOND NOTICE

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

IAAO

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

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

TOTAL DUE: 225.00

You have been a member since May, 2007.

Mailing Address:

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

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



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



Please contact designations@iaao.org for more information.

Please return form with payment to:

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

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

Pay online anytime at www.iaao.org!

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

CHECK OR CREDIT CARD ONLY

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

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

CARD NUMBER	  	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 1-800-616-4226.

Northeastern Regional Association of Assessing Officers
An Affiliate of the International Association of Assessing Officers

Membership Application

Dear Assessing/Appraising Professional,

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

In order to reach the above goals, the NRAAO sponsors an annual conference. This year the conference was held at Gurney's Newport Resort, 1 Goat Island, Newport, Rhode Island 02840, 401-849-2600, April 28 – May 1, 2019. As a professional in the appraising field, you would be gaining insight to how the assessment field operates, learn about new laws and regulations and meet with assessing officials from various communities, states and provinces. As an assessor, you too would be gaining much needed information in order to perform your job in a professional manner. As an added bonus, credits are given towards certification in each related field. In addition, conference registration fees will be reduced for NRAAO members attending the 56th Annual Conference to be held at Atlantic City Hard Rock Hotel & Casino Atlantic City, New Jersey MAY 17-20, 2020

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

OR PAY ONLINE – NRAAO.ORG (fees apply)

The fee structure is as follows:

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

RENEWAL MEMBERSHIP APPLICATION 2020
NORTHEASTERN REGIONAL ASSOCIATION OF ASSESSING OFFICERS

Name: Paige Watten Title: Assessor Date: 12/3/19
Jurisdiction/Firm: Town of Watford Phone Number: (860) 444-5822
Mailing Address: 15 Rope Ferry Rd City: Watford ST: CT Zip: 06385
Fax Number: _____ E-Mail Address: gwatten@watford-ct.org
Signature: [Signature]

Complete this application and return it with the appropriate fee by check, voucher or money order made out to NRAAO and return to NRAAO, c/o Betsy Quist, P.O. Box 5005, Woodbridge, CT 06525-5005. If you have any questions, please do not hesitate to call me at 203-389-3417 or e-mail at bquist@woodbridgect.org

**GREATER NEW LONDON AREA ASSESSORS
ASSOCIATION**

2019 Membership Dues Notice

For April 1, 2019 through March 31, 2020

Name: Paige S. Walton
Municipality: Town of Waterford
Address: 15 Rope Ferry Rd.
City/State/Zip: Waterford, CT 06385
Phone Number: (860) 444-5822
Email: pwatton@waterfordct.org

Dues are \$15.00

Make checks payable to GNLA

Please remit your payment with completed form to:

Kathi Race, Assessor's Office
Town of East Hampton
20 East High Street
East Hampton, CT 06424-1000

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

Paige Walton

From: Labarbera, Larry <labarbera@townofwindsorct.com>
Sent: Thursday, May 13, 2021 7:25 PM
To: CAAO Hotline (caao-hotline@caao.com)
Subject: CAAO Hotline: Annual Assessor School

**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.**

Annual Assessor School

Reminder – Deadline to Register is Friday May 14th, 2021

Payment must be received by May 24th, 2021

Workshops are hybrid, In-person & Zoom - 06/01/21 – 06/04/21

CCMA classes are all Virtual. \$325/class

Virtual – Participants must have a stable internet connection and the ability to login to Zoom using a computer, laptop or tablet camera. Video must be on at all times, except for scheduled break times, with student being present and actively participating for the entire class.

CCMA Classes week 1 – 06/07/21 – 06/11/21 \$325/class

CCMA Course 1A – Assessment Administration

CCMA Course 2A – Introduction to Appraisal Principles

CCMA Course 4 – Revaluation Course

CCMA Classes week 2 – 06/14/21 – 06/18/21 \$325/class

CCMA Course 1B – Assessment Valuation

CCMA Course 2B – Application of Valuation Techniques

CCMA Course 3 – Income Approach to Value

Course Descriptions and prerequisites

NRAAO / NHAO 2021 CONFERENCE A VIRTUAL EXPERIENCE!



REGISTRATION

Name

Firm

Mailing Address

City/State/Zip

Phone

Email

All Registrations cover Sunday May 23- Wednesday May 26, 2021

- | | |
|---|-------|
| ☐ Early Bird NRAAO Member (Registration received before 4/23/2021) | \$150 |
| ☐ Early Bird Non-Member (Registration received before 4/23/2021) | \$200 |
| ☐ NRAAO Member (Registration received after 4/23/2021) | \$200 |
| ☐ Non-Member (Registration received after 4/23/2021) | \$250 |

BECOME A CONFERENCE BOOSTER!

- ☐ Yes, I would like to be a BOOSTER and have enclosed my \$25 Contribution. \$25

Please list my name during the conference as a patron.

Name

Firm

Total Amount Due

\$

Please check which education sessions you plan to attend:

Monday, May 24, 2021

- | | |
|--|--|
| ☐ Development of Cap Rates Part 1 | ☐ Taxes, Land Use and Value |
| ☐ Development of Cap Rates Part 2 | ☐ Leading With Emotional Intelligence |

Tuesday, May 25, 2021

- | | |
|---|---|
| ☐ Mass Appraisal Analysis & Benchmarks Part 1 | ☐ Journey to Assess. Excellence Part 1 |
| ☐ Mass Appraisal Analysis & Benchmarks Part 2 | ☐ Journey to Assess. Excellence Part 2 |
| ☐ A Year in the Life of a Personal Property Appraiser | ☐ Journey to Assess. Excellence Part 3 |
| ☐ Recognizing Obsolescence in Tangible Personal Property | ☐ Journey to Assess. Excellence Part 4 |

Wednesday, May 26, 2021

- | | |
|---|---|
| ☐ Hotel Appraisal Part 1 of 2 | ☐ DRA Mosaic |
| ☐ Hotel Appraisal Part 2 of 2 | ☐ Defending a Commercial Assessment Using 3 Approaches |
| ☐ Power BI 101- An Awesome Tool | ☐ Ethics in Assessing |
| ☐ Impact of Covid-19 on the Real Estate Market | ☐ Building a Land Curve |
| ☐ Awards and Swearing in of New Officers | |

Mail payments to: Normand Pelletier
Treasurer
67 Rangers Drive
Hudson, NH 03051

Checks Payable to:
NRAAO Conference 2021
NO REFUNDS AFTER MAY
7, 2021

Are you a past NRAAO President?

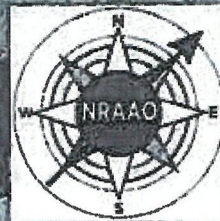
☐ YES ☐ NO

If Yes, what year/s?

NRAAO / NHA AO

2021 CONFERENCE

A VIRTUAL EXPERIENCE!



REQUEST FOR CONTINUING EDUCATION CREDIT

This form was developed for your convenience in reporting continuing education to various states and assessment agencies. It does not imply automatic acceptance by any organization. All requests are verified by the organization against the recorded attendance of each session. EMAIL FORM TO Jim Commerford: nraao credit@gmail.com. Once approved, the form will be sent back to the attendee for submission to local/state certification board.

Name Paige S. Walton Firm Town of Waterford

Mailing Address 2432 Dairy RD.

City/State/Zip Cosby, TN 37722

Phone (800) 857-8303 Email pdoran@esnet.net

I certify that I have completed the below described professional activity. I am aware that any misrepresentations by me may become subject to disciplinary action.

Paige S. Walton
Signature of Participant

5/25/2021
Date

Please check the education sessions you attended. Each session is 1.5 hours.
All requests are verified.

Track 1		Track 2	
Monday, May 24, 2021			
Development of Cap Rates Part 1		Taxes, Land Use and Value	✓ 21
Development of Cap Rates Part 2		Leading With Emotional Intelligence	✓ 21
Tuesday, May 25, 2021			
Mass Appraisal Analysis & Benchmarks Part 1		Journey to Assess. Excellence Part 1	✓ 21
Mass Appraisal Analysis & Benchmarks Part 2		Journey to Assess. Excellence Part 2	✓ 21
A Year in the Life of a Personal Property Appraiser		Journey to Assess. Excellence Part 3	✓ 21
Recognizing Obsolescence in Tangible Personal Property		Journey to Assess. Excellence Part 4	✓ 21
Wednesday, May 26, 2021			
Hotel Appraisal Part 1 of 2		DRA Mosaic	
Hotel Appraisal Part 2 of 2		Defending a Commercial Assessment Using 3 Approaches	
Power BI 101- An Awesome Tool		Ethics in Assessing	
Impact of Covid-19 on the Real Estate Market		Building a Land Curve	

Approved by: Jim Commerford Date: 6/7/21

(9.0 hrs)

UNIFORM REQUEST FOR RECERTIFICATION CREDIT

This form was developed for your convenience in reporting continuing education to various appraisal organizations. It does not imply automatic acceptance by any organization of an education program. Each group retains its own recertification and procedures for requesting credit. A copy of the program brochure or outline may be required.

1. This form must be completed in its entirety. Please type or print.
2. Please submit a copy to each organization from which you are requesting credit.
3. It is suggested that you keep a photocopy of each form submitted.

CT CCMA COMMITTEE

CCMA

ORGANIZATION TO SUBMIT

DESIGNATION

MEMBER #

MEMBER NAME

NUMBER OF INSTRUCTION HOURS

Page Walton

3

SPONSORING ORGANIZATION

PROGRAM LOCATION

WAAA

Virtual

TITLE OF PROGRAM

PROGRAM DATE

Self-Storage Building Workshop

April 21, 2021

PRESENTERS

DESCRIPTION OF ACTIVITY AND CONTENT

John Galvin

Self Storage Valuation

EVIDENCE OF COMPLETION

Mary Lavallee

I certify that I have completed the above-described professional activity. I am aware that any misrepresentation by me may become subject to disciplinary action.

Mary Lavallee, CCMA #

SIGNATURE OF MEMBER

DATE

MEMBER NAME PRINT

MAIL ADDRESS

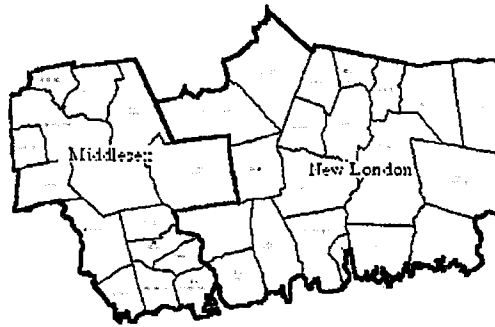
CITY

STATE

ZIP

FOR OFFICE USE ONLY

Greater New London Area Assessor's Association



March 31, 2021

10:00Am-Noon

Zoom Webinar

Topic: The Greater New London Area Association was pleased to provide a Webinar on Deeds and Probate Forms Affecting Title
This webinar was presented by attorney Joan Reed Wilson

Continuing

Education: This Webinar has been approved for 2 hours of Continuing Education by the CCMA Committee. You are receiving this certificate as proof of attendance at the webinar. Please fill out the remainder of the form to submit to the CCMA Committee with your recertification application.

Name: Paige S Walton

Signature:

A handwritten signature in black ink, appearing to be 'Paige S Walton', written over a horizontal line.

CCMA #: 1461



INVOICE DATE	CUSTOMER	SUMMARY INVOICE
10/22/21	NYC 70112090	8063988457
PLEASE PAY BY	TERMS	AMOUNT DUE
12/06/21	2% 10 NET 45 DAYS	62.60

INVOICE DETAIL

Staples

Federal ID #:04-3390816

Bill to Account: 410806

Ship to Account: TOW FINANCE

TOWN OF WATERFORD
WARTLEIGH MCCORMELL
15 ROSE FERRY RD
WATERFORD, CT 06385-2806

TOWN OF WATERFORD
ATTN: RANLE DUMMETT
15 ROSE FERRY RD
WATERFORD, CT 06385-2806

Budget Ctr :
Budget Ctr Desc :
P O Number : FY18/181002
P O Desc :
Release : 10107-53010 ASSESSOR
Release Desc :

Invoice Number: 3490498458
Order : 7341792667-000-001
Ordered by : RANLE DUMMETT
Order Date : 10/18/21

Release Desc :									
Order Line	Item Number	Description	Order Qty	S/O Qty	Unit Meas	Ship Qty	Unit Price	Extended Price	
1	24380517	TR 8IN SCISSORS ST 2PK	1		0 PK	1	4.47	4.47	
Freight:		.00	Tax: (.0000 %)		.00	Sub-Total:		4.47	
								Total:	4.47

Richard Messina

From: Richard Messina
Sent: Monday, October 18, 2021 10:59 AM
To: Rawle Dummett
Subject: staples order

Hi rawle can you order 2 calculators tr44780 tru red 12 digit desktop calculators and 1 2 pack of scissors tr55043 thank you

Total
\$ 71.25



CONNECTICUT ASSOCIATION OF ASSESSING OFFICERS

MOTOR VEHICLE COMMITTEE

SUBSCRIPTION RENEWAL PACKAGE

2021 MOTOR VEHICLE PRICING PACKAGE

Monday, May 3, 2021

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

1 2021 MOTOR VEHICLE PRICING PACKAGE \$ 470

Includes one (1) copy each of the following:

NADA Used Car Guide NADA Older Used Car Guide
NADA Commercial Truck Guide NADA Motorcycle Guide
NICB Vehicle ID Manual

ADD Total Amount figure from "ADDITIONAL NADA" form \$ _____

TOTAL AMOUNT DUE TO CAAO, INC \$ 470.00

MAKE CHECK PAYABLE TO CAAO, INC

DATE 5/12/21
MAIL ALL ORDER FORMS & PAYMENTS TO: SIGN
AMOUNT \$470
ACCOUNT # 10164-5320
CLOSE PO Y N
PO# FY 2021
VENDOR# 69
APPROVED

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

September 27, 2021

TO: Municipal Assessors

FROM: Martin L. Heft, Undersecretary
Intergovernmental Policy and Planning Division

RE: **RECOMMENDED MOTOR VEHICLE PRICING SCHEDULE FOR
THE GRAND LIST OF 2021**

The Office of Policy and Management, in cooperation with the Connecticut Association of Assessing Officers, Inc. and in accordance with §12-71d of the Connecticut General Statutes, is recommending the use of the October 2021 National Automobile Dealers Association (N.A.D.A.) Guides in preparation of the Grand Lists.

The following guides are to be used for the 2021 Grand List:

- For valuing domestic cars, imported cars, light and medium duty trucks, 100, 200, and 300 series vans and mini-vans – excluding vehicles that have been customized or modified by other than standard vehicle options and excluding trucks with any body other than a standard pick-up body or van with a body other than the standard:
NADA Official Used Car Guide (Eastern Edition) - Clean Retail
NADA Official Older Used Car Guide - Clean Retail
- For valuing motorcycles, snowmobiles and all-terrain vehicles:
NADA Motorcycle/Snowmobile/ATV/Personal Watercraft Appraisal Guide - Average Retail
- For valuing motor homes, travel trailers and camping trailers:
NADA Recreation Vehicle Appraisal Guide - Used Retail

These schedules reflect the 100% average retail price/"Clean Retail Value" of motor vehicles for the current assessment year and are recommended for use in the preparation of the 2021 Grand List. The assessment must reflect seventy percent (70%) of the recommended values. The valuation of motor vehicles not included in the above recommended schedules continues to be the responsibility of the assessor.

Monthly Postage
Assessor's Office

Assessor's Office FY21 Postage	Metered Mail	# Items	BAA FY 21 Postage	Metered Mail	# Items
Jul-20	93.55	174		0	0
Aug-20	14.50	29		0	0
Sep-20	0.00	0		0	0
Oct-20	20.60	38		0	0
Nov-20	31.00	57		0	0
Dec-20	9.50	19		0	0
Jan-21	542.88	2331		1.5	3
Feb-21	336.78	658		19.38	38
Mar-21	192.16	376		16.83	33
Apr-21	8.16	16		0	0
May-21	9.07	17		0	0
Jun-21	28.08	53		0	0
Total Postage	\$ 1,286.28	3768		\$ 37.71	74
FY 22 Postage					
Jul-21	16.21	30		0	0
Aug-21	9.56	18		0	0
Sep-21	28.62	53		0	0
Oct-21	33.32	60		8.25	15
Nov-21	50.50	92		0	0
Total Postage	\$ 138.21	253		\$ 8.25	15

**TOWN OF WATERFORD
PROPOSED REVENUE BY DEPARTMENT
GENERAL FUND
2022-2023 FISCAL YEAR**

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

DEPARTMENT: ASSESSOR

LINE ITEM	2019-2020 ACTUAL	2020-2021 ACTUAL	2021-2022 YTD	2022-2023 PROPOSED	VARIANCE
Alarm Monitoring					0
Alarm Penalties					0
Ambulance Subsidy					0
Beach Admission Fees					0
Benefit Assessments					0
Bulky Waste Fees					0
Conveyance Tax					0
Copy Fees	564	273	166	316	150
East Lyme Animal Control Fee					0
Enhanced E 9-1-1					0
Fines/Penalties					0
Hazardous Household Waste					0
Inspection Fees					0
Interest/Lien Fees					0
Inter-Municipal Revenues					0
Miscellaneous					0
Permitting/Licensing Fees					0
Program/Registration Fees					0
Recording Fees					0
Regional Communications Fees					0
Rentals					0
Sale of Recyclables					0
State Operational Grants					0
Tipping Fees					0
Versa Kart/Blue Box Purchases					0
					0
					0
					0
					0
					0
TOTALS	564	273	166	316	150