

JEFFERSON PARISH SOQ NO. 22-020
RESOLUTION NO. 139271
GENERAL GOVERNMENT BUILDING
200 DERBIGNY STREET SUITE4400
GRETNA, LA 70053

ATTN: Melissa Ovalle
MOvalle@jeffparish.net

Submission by: Big River Title, LLC



SOQ No. 22-020

Real Estate Abstracting Services

Submission Deadline: April 22, 2022 at 3:30 PM

ATTENTION VENDORS!!!

Please review all pages and respond accordingly, complying with all provisions in the public notice and Jefferson Parish Code of Ordinances Section 2-926 et seq. All submissions must be received on the Purchasing Department's e-Procurement site, www.jeffparishbids.net, by the SOQ submission deadline date and time. Late submissions will not be accepted.

**Jefferson Parish Purchasing Department
General Government Building
200 Derbigny Street, Suite 4400
Gretna, LA 70053
Buyer Name: Melissa Ovalle
Buyer Email: MOvalle@jeffparish.net
Buyer Phone: 504-364-2687**

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:
Real Estate Abstracting Services Resolution No. 139271

B. Firm Name & Address: **BIG RIVER TITLE, LLC**
7922 Summa Ave, Ste A-3
Baton Rouge LA 70809

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:
Deborah Berthelot, Manager, (225) 924-9195, dberthelot@bigrivertitle.com

D. Address of principal office where Project work will be performed:
7922 Summa Ave, Ste A-3
Baton Rouge LA 70809

E. Is this submittal by a JOINT-VENTURE? Please check:

YES

☐

NO

☒

If marked "No" skip to Section H. If marked "Yes" complete Sections F-G.

F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.

1.

2.

General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES ☐ NO ☐

N/A

H. List all subcontractors anticipated for this Project. Please note that all subcontractors must submit a fully completed copy of this questionnaire, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.

Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1.		
2.		
3.		
4.		
5.		

General Professional Services Questionnaire

I. Please specify the total number of support personnel that may assist in the completion of this Project: <u>5</u>
J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.
PROFESSIONAL NO. 1
Name & Title: David C Bolton, Attorney
Name of Firm with which associated: Big River Title, LLC
Description of job responsibilities: Review civil litigation or litigious issues of title, detail required civil actions, regularly assist with notarial acts, assists in research relevant to business organizations, tax issues and serves as HOA management legal counsel, collection attorney, researches common law property issues, civil property law and litigation associated with boundary disputes and HOA disputes and business law (corporate formations and litigation), Homeowners' Association management consultant and general management consultant
Years' experience with this Firm: 3
Education: Degree(s)/Year/Specialization: J.D. 2005 Mississippi College of Law, Jackson, MS B.A. History, Southeastern Louisiana University, Hammond LA
Other experience and qualifications relevant to the proposed Project: Commercial Carpenter, Commercial carpentry including metal stud framing and sheetrock installation, fire proofing, read and implemented blueprints, supervised crews of 4 to 10 people for jobs around Louisiana REAL ESTATE LITIGATION: Cobb v. Mitchell, 2012-1032, 2012-67 (La.App. 1 Cir. 6/27/2013), 121 So.3d 692; Haney v. Lewis, 2013-2053 (La.App. 1 Cir. 9/8/2014) Resume attached.

General Professional Services Questionnaire

PROFESSIONAL NO. 2
Name & Title: Melissa Neyland, Notary Public, Paralegal
Name of Firm with which associated: Big River Title, LLC
Description of job responsibilities: Determines requirements for condemnation law and procedure, experience with community partner programs, land bank projects and quiet title process; assists clearing title on adjudicated properties, acquiring and transferring adjudicated properties to non-profit and for-profit organizations; identifies adjudicated, blighted and vacant properties, determines owners and location; maintains data on properties.
Years' experience with this Firm: 3
Education: Degree(s)/Year/Specialization: 2001 Lafayette Regional Technical Institute – Notary/Real Estate Class 2002 LSU – Notary Public Preparation Class-Commissioned Notary Public 2004 2004 Jones Walker Intro to Microsoft Excel and Power Point 2004 Jones Walker Certification in Microsoft Word
Other experience and qualifications relevant to the proposed Project: 2005 Fred Pryor Seminars - Administrative Assistant's Time Management 2005 BR Community College – Accounting Fundamentals 2005 Skillpath Seminars – Indispensable Assistant 2009 Louisiana Notary Assoc – Real Estate Certified Signing and Closing Agent 2010 Skillpath Seminars Managing Multiple Projects 2013 BR Community College – Assoc Degree of Applied Science in Paralegal Studies
Resume attached

General Professional Services Questionnaire

PROFESSIONAL NO. 3
Name & Title: Yolanda Charles, Administrative Assistant
Name of Firm with which associated: Big River Title, LLC
Description of job responsibilities: Deadlines, notifications, telephone, scanning, assembly and shipping.
Years' experience with this Firm: 5
Education: Degree(s)/Year/Specialization: N/A
Other experience and qualifications relevant to the proposed Project: 15 years experience in real estate support, experience with political subdivisions, city councils, resolutions, drafts pleadings for District and Federal Court, civil deadlines.

General Professional Services Questionnaire

PROFESSIONAL NO. 4
Name & Title: Deborah Berthelot, Attorney
Name of Firm with which associated: Big River Title, LLC
Description of job responsibilities: Research and compile abstracts; Examine title for residential, commercial, oil and gas or US government tracts; Title curative services; Draft leases; File small successions; Comply with US underwriter requirements; Review business organizations; Execute sales of movable and immovable property; File title insurance claims
Years' experience with this Firm: 20
Education: Degree(s)/Year/Specialization: University of Phoenix, M.B.A. (2009), Baton Rouge, Louisiana Paul M Hebert Law Center, LSU, J.D. (1995) Baton Rouge, Louisiana Louisiana State University, B.A. (History), (1991) Baton Rouge, Louisiana
Other experience and qualifications relevant to the proposed Project: 46 years of abstracting experience with fee titles, oil and gas and industrial property, experience examining titles for right of way projects, eminent domain, pipelines, servitudes, sales, and mortgages; experience with government entity acquisitions and tax adjudications; experience identifying title issues; experience identifying parties of interest for notice purposes; familiar with civil litigation involving business organizations (formation, termination, dissolution), tax sale litigation; familiar with financing methods, liens/claims (drafting and collection for private works act or successions), leases (residential, commercial, oil and gas, billboard, cell towers); restrictions and covenants. Resume attached.

General Professional Services Questionnaire

PROFESSIONAL NO. 5
Name & Title: Harvey W Cook, Attorney
Name of Firm with which associated: Big River Title, LLC
Description of job responsibilities: Research and compile abstracts for subject property, comprehensive title examination listing requiremnts for curative issues arising from all areas of law affecting marketability; ancillary research matters, real estate closings, title insurance, review of final products.
Years' experience with this Firm: 1
Education: Degree(s)/Year/Specialization: Juris Doctorate, Paul M Hebert Law Center, Louisiana State University, Baton Rouge, Louisiana, May 1991 Bachelor of Arts, Louisiana College, Pineville, Louisiana, May 1985
Other experience and qualifications relevant to the proposed Project: Past positions during law school with law library makes him familiar with location and availability of secondary resources.

General Professional Services Questionnaire

K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.

PROJECT NO. 1	
Project Name, Location and Owner's contact information: Ascension Parish Industrial Pipeline Right of Way Irl Silverstein, Silverstein Law Firm (504) 362-3692	Description of Services Provided: Locate and research all owners along pipeline corridor in Ascension Parish, determined current owners, ran all assignees, compiled abstracts on each tract, indexed and cross-referenced.
Length of Services Provided: 10 weeks	Cost of Services Provided: \$9000

PROJECT NO. 2	
Project Name, Location and Owner's contact information: Pointe Coupee mineral research 2018 Daniels Land Services, Inc. www.danielslandservices.com	Description of Services Provided: Abstract mineral titles for all tracts of interest depicted on Tobin survey, draft descriptions for lease, determine present owners and all interests with contact information.
Length of Services Provided: 9 months	Cost of Services Provided: Per diem rate \$350 + expenses

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
City of Baton Rouge/Parish of East Baton Rouge Sewer Project; Supervisor: AP Manint, Ret. (225) 964-1643	Examining attorney for East Baton Rouge Sewer Project, Perform title examinations for all tract owners/lessees; Locate parcels for servitudes/rights of way; Draft title opinion letters for extremely large landholder tracts; Identify owners, tracts or issues for general contractors; Report to administration on status; Meet with engineering staff and order additional research when necessary; Meet with different project branches for status and projected goals.
Length of Services Provided:	Cost of Services Provided:
5 years	\$4000 month

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

General Professional Services Questionnaire

PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

General Professional Services Questionnaire

PROJECT NO. 7	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

PROJECT NO. 8	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

General Professional Services Questionnaire

PROJECT NO. 9	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

PROJECT NO. 10	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Length of Services Provided:	Cost of Services Provided:

General Professional Services Questionnaire

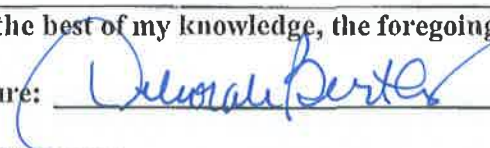
L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary. None

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1.		
2.		
3.		
4.		

M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.

Our personnel are experienced abstractors and support staff with great attention to detail.

N. To the best of my knowledge, the foregoing is an accurate statement of facts.

Signature:  Print Name: Deborah Berthelot
 Title: Manager Date: 4/21/2022

Statement of Qualifications

AFFIDAVIT

STATE OF LOUISIANA

PARISH/COUNTY OF EAST BATON ROUGE

BEFORE ME, the undersigned authority, personally came and appeared: Deborah Berthelot, (Affiant) who after being by me duly sworn, deposed and said that he/she is the fully authorized Manager of Big River Title, LLC, the party who submitted a Statement of Qualifications (SOQ) to perform abstracting services, to the Parish of Jefferson. ____

Affiant further said: _____

Campaign Contribution Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all campaign contributions, including the date and amount of each contribution, made to current or former elected officials of the Parish of Jefferson by Entity, Affiant, and/or officers, directors and owners, including employees, owning 25% or more of the Entity during the two-year period immediately preceding the date of this affidavit or the current term of the elected official, whichever is greater. Further, Entity, Affiant, and/or Entity Owners have not made any contributions to or in support of current or former members of the Jefferson Parish Council or the Jefferson Parish President through or in the name of another person or legal entity, either directly or indirectly.

Choice B ✓ there are **NO** campaign contributions made which would require disclosure under Choice A of this section.

Affiant further said:

Debt Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all debts owed by the affiant to any elected or appointed official of the Parish of Jefferson, and any and all debts owed by any elected or appointed official of the Parish to the Affiant.

Choice B ✓ There are NO debts which would require disclosure under Choice A of this section.

Affiant further said:

Solicitation of Campaign Contribution Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____ Attached hereto is a list of all elected officials of the Parish of Jefferson, whether still holding office at the time of the affidavit or not, where the elected official, individually, either by telephone or by personal contact, solicited a campaign contribution or other monetary consideration from the Entity, including the Entity's officers, directors and owners, and employees owning twenty-five percent (25%) or more of the Entity, during the two-year period immediately preceding the date the affidavit is signed. Further, to the extent known to the Affiant, the date of any such solicitation is included on the attached list.

Choice B ✓ there are NO solicitations for campaign contributions which would require disclosure under Choice A of this section.

Affiant further said:

Subcontractor Disclosures

(Choose A or B, if option A is indicated please include the required attachment):

Choice A _____

Affiant further said that attached is a listing of all subcontractors, excluding full time employees, who may assist in providing professional services for the aforementioned SOQ.

Choice B  _____

There are NO subcontractors which would require disclosure under Choice A of this section.

Affiant further said:

That Affiant has employed no person, corporation, firm, association, or other organization, either directly or indirectly, to secure the public contract under which he received payment, other than persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project or in securing the public contract were in the regular course of their duties for Affiant; and

[The remainder of this page is intentionally left blank.]

That no part of the contract price received by Affiant was paid or will be paid to any person, corporation, firm, association, or other organization for soliciting the contract, other than the payment of their normal compensation to persons regularly employed by the Affiant whose services in connection with the construction, alteration or demolition of the public building or project were in the regular course of their duties for Affiant.


Signature of Affiant

DEBORAH BERTHELOT
Printed Name of Affiant

SWORN AND SUBSCRIBED TO BEFORE ME
ON THE 22nd DAY OF April, 2022


Notary Public

David C. Bolton
Printed Name of Notary

30344
Notary/Bar Roll Number

My commission expires 12/2024

ATTACHED RESUMES

David Creighton Bolton
555 Pierce Ave.
Baton Rouge, LA 70806
(225) 772-9532
dcboltonlaw@gmail.com

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PROFESSIONAL WORK

Attorney/Owner, The Law Office of David Creighton Bolton, 2020 to present

General litigation practice with practice areas in personal injury and medical malpractice, property law and litigation associated with boundary disputes and HOA disputes, business law (corporate formations and litigation), corporate clients in a variety of businesses including retail, construction, Homeowners' Association management, and restaurant consulting and general management for a southeast regional company. Additional work includes estate planning and contract preparation, review, negotiation, and divorce.

Attorney Nodier Law Firm, LLC 2019-2020

Corporate defense work, clients included national cable company and a national brand of restaurant chains. Litigation throughout the state including federal courts.

Fairchild & Bolton, L.L.C., Baton Rouge, Louisiana 2015 to present

General litigation practice with focus on business law (corporate formations and litigation). Work includes estate planning and contract preparation, review and negotiation. General Counsel and Interim Director of Investigations, Louisiana State Board of Nursing, Baton Rouge, Louisiana

2016 to 2017

Chief legal officer for 55+ employee agency with agency oversight of approximately 64,000 licensed registered nurses and advanced practice registered nurses, plus student nurses. Managed staff of 13 in the division of investigations and one paralegal under the office of General Counsel.

Created, reviewed and implemented rules and regulations applicable to the rules and regulations falling within the scope of the Louisiana Nurse Practice Act. Argued appeals from the hearings department at the 19th JDC.

Advised directors and staff regarding legal issues. Interpreted legislation and provided training and legal assistance to ensure compliance.

Attorney, Rowe Law Firm, Baton Rouge, Louisiana

2006 to 2015

Represented the Louisiana Patient's Compensation Fund and Louisiana Farm Bureau Insurance Company in litigation of (1) medical malpractice claims, (2) automobile claims (personal injury and property damage). Work included corporate formations and litigation

for local businesses. Represented defendants in the cases listed below. All references to appellate work below include my work drafting and filing the appeal, as well as, performing the oral argument.

Louisiana Supreme Court Experience:

Khammash vs. Clark, 2013-1564, 2013-1736 (La. 7/1/2014), 145 So.3d 246

Medical Malpractice-Oral argument to Louisiana Supreme Court. Supreme Court reinstated the jury's verdict for defense (overturning the decision of the First Circuit).

Trial and Appellate Experience:

Thongsavanh v. Schexnayder, 2009-1462 (La.App. 1 Cir. 5/7/2010), 40 So.3d 989

Medical Malpractice-Jury Trial, First Chair. Plaintiff verdict with oral argument. First Circuit upheld jury verdict.

Medical Malpractice-Boutte v. Meadows, 2013-1189 (La.App. 1 Cir. 2/18/2014)

Trial, First Chair. Defense verdict with oral argument with remand back to trial court (settled).

Varnado v. Brian

Insurance defense-Jury Trial, First Chair. First chair jury trial.

Dotson v. Hubbard, 2009-1194 (La.App. 1 Cir. 2/12/2010)

Trial, First Chair. Defense verdict with no appeal.

Landry v. Dr. Broussard

Medical Malpractice-Jury Trial, Second Chair. Defense verdict with no appeal.

Crawford v. Dr. Wellmeyer

Medical Malpractice-Jury Trial, Second Chair. Defense verdict with no appeal.

Pellegrin v. Louisiana Heart Hosp., L.L.C., 2010-2174 (La.App. 1 Cir. 5/6/2011)

Medical Malpractice-Jury Trial, Second Chair. Defense verdict with oral argument. First Circuit upheld defense verdict.

Plaisance v. Farm Bureau

Jury Trial, Second Chair. Plaintiff verdict with no appeal.

Drago v. Friedman

Insurance defense-Jury Trial, Second Chair. Defense verdict with no appeal.

Bertrand v. Kudla, 2014-61, 2014-62 (La.App. 3 Cir. 6/4/2014), 139 So.3d 1233
Medical Malpractice-Jury Trial, Second Chair. Defense verdict appealed with oral argument at Third Circuit with defense verdict overturned.

Khammash vs. Clark, 2013-1564, 2013-1736 (La. 7/1/2014), 145 So.3d 246
Medical Malpractice-Jury Trial, Second Chair, see below.

Cantrell v. Collins, 2007-1192 (La.App. 1 Cir. 4/25/2008), 984 So.2d 738
Property law-Trial, Second Chair. Represented defendant at the First circuit and overturned/reversed plaintiff verdict. First recorded case.

Cobb v. Mitchell, 2012-1032, 2012-67 (La.App. 1 Cir. 6/27/2013), 121 So.3d 692
Medical Malpractice-Trial court granted JNOV, on oral argument reversed at First Circuit.

Norwood v. Medina, 2009-1780 (La.App. 1 Cir. 3/26/2010)
Medical Malpractice-Plaintiff verdict, drafted and filed appellant's brief. First Circuit upheld jury verdict (no oral argument).

Wood v. Humphries, 2011-2161 (La.App. 1 Cir. 10/9/2012), 103 So.3d 1105
Medical Malpractice-Trial court granted JNOV, on oral argument reversed at First Circuit.

Angelos v. Ruckstahl, 2012-202 (La.App. 1 Cir. 9/21/2012)
Property law-Oral argument overturned trial court on issue of property line and remanded back to trial court for further proceedings.

Haney v. Lewis, 2013-2053 (La.App. 1 Cir. 9/8/2014)
Medical Malpractice-Trial court granted JNOV, brief only, reversed at First Circuit; however, remanded to trial court for new trial (pending).

GENERAL WORK EXPERIENCE

Commercial Carpenter, Bolton Company, Bolton Brothers Construction, M. Bolton Construction and Thornco Construction, Baton Rouge, Louisiana (1988 to 2006)
Commercial carpentry including metal stud framing and sheetrock installation, fire proofing, read and implemented blueprints, supervised crews of 4 to 10 people for jobs around Louisiana including, but not limited to, Lod Cook (LSU), Baton Rouge General on Bluebonnet, plaster work on Tiger Stadium, and multiple renovation projects including the Louisiana State Capitol.

Bid Contractor, Kohler Inc., Louisiana, Texas and Mississippi, 1999
Installed Kohler plumbing products in Home Depos in Texas, Louisiana, and Mississippi. Work included re-sets of plumbing areas and creation of special order bays from scratch to highlight Kohler products.

Coach, YMCA, Parkview Baptist and Episcopal High School, Baton Rouge, Louisiana

- Flag football, basketball and baseball for the YMCA (1991 to 1996).

- Fifth and Sixth grade tackle football for Parkview Baptist (co-head coach). Taught fundamentals of the game, offensive coordinator, offensive line coach and linebacker coach (1997).

- Fifth and Sixth grade football, basketball and baseball coach, assisted with Seventh and Eighth grade football and high school football for Episcopal High School.

Taught fundamentals of the game, offensive coordinator, defensive and offensive line coach and assisted Will York with the Seventh and Eighth grade games, as well as, spring training for the Varsity and JV (2000 to 2002 and 2005 to 2006).

EDUCATION

Mississippi College School of Law, J.D. 2005, Jackson, Mississippi

Southeastern Louisiana University, B.A. (History), Hammond, Louisiana

MELISSA A. NEYLAND

8455 Pink Graves Road, Denham Springs, Louisiana 70706 (225) 936-4244 liveoakgifts@cox.net

OBJECTIVE

To obtain a position utilizing my vast real estate legal skills in an environment beneficial for mutual growth and development.

SUMMARY OF QUALIFICATIONS

Over 25 years of combined experience in accounting, administration, project management, and the legal profession with strong work ethics and excellent communication skills:

- Accounting experience includes: accounts receivable and payable, general ledger, assistance with budget creation and monitoring, and supervisor over complete billing process
- Legal experience includes: paralegal/notary public and legal secretary duties, assist attorneys with commercial and residential real estate transactions, legal and property research skills, pre/post-closing transactions, curative/title work, drafting legal documents, and exposure to estate planning, family law, litigation and corporate legal services
- Project Management experience includes: researching processes and procedures, implementation, managing and monitoring of programs and projects with special attention to facilitating between various City/Parish Departments and outside consultants/contractors

PROFESSIONAL EXPERIENCE/ACCOMPLISHMENTS

East Baton Rouge Redevelopment Authority- Real Estate Specialist 5/2009 to Present

Promoted to Real Estate Specialist to assist the Real Estate Director and manage the projects listed below:

- Assist in developing the community partner program, land-banking projects and quiet title process
- Clearing title on adjudicated properties and responsible for all closing transactions
- Successful acquisition and transfer of over 130 adjudicated properties to non-profit and for-profit organizations to bring the properties back into commerce
- Supervise, manage and monitor 103 CDBG funded (LRA/NSP) previously adjudicated/quiet title properties transferred to 4 non-profits to develop affordable housing units in low income areas
- Identify, map, and research adjudicated, blighted and vacant properties for potential community partners (Accurint/LexisNexis, City/Parish Databases and Records)
- Assist in cultivating a program to acquire City/Parish surplus properties
- Effective implementation of a program to acquire tax sale properties and maintain data base
- Develop and manage internship/externship program for LSU, Southern University, and BRCC law students

Administrative Assistant:

- Accounts receivable and payable, accounting reports, general ledger entering payroll data and deposits, bank reconciliations (QuickBooks)
- Maintain President, Vice President and 3 Project Managers' calendars and contacts, schedule and coordinate all meetings (Microsoft Outlook)
- Managing all office supplies and equipment
- Access and Research City/Parish data bases and records (Clerk of Court, Tax Collector and Tax Assessor)
- Draft letters and documents, recordation in the clerk of court and filing documents at the Secretary of State
- Minute/note-taker for board, staff and public meetings and maintaining company website

Jones Walker Law Firm- Legal Secretary/Assistant 1/2004 to 5/2005 and 7/2007 to 5/2009

Legal Secretary in the Corporate/Real Estate Division:

- Draft legal documents and letters for attorney's review and execution
- Entering attorney time for billing, assist in review and edits of invoices
- Dictation and transcription
- Preparation of power point presentations, design charts, spreadsheets and tables
- Recording legal documents, filing documents with the Secretary of State and various other notary work
- Gathering information from clerk of court, clients, abstractors and surveyors, preparation of title commitments, and curative work
- Assist paralegals with projects and document management

Law Office of Donald E. Bradford (From Jones Walker)-5/2005 to 6/2007

Office Administrator, Legal secretary, Paralegal/Notary and Accounting:

- Real estate closings and transactions, draft, prepare and execute commercial leases for major developer and contractors, preparation of cancellations and title commitments/policies
- Accounts receivables and payables, general ledger, data entry, reconciliations, maintain client funds in the client trust account, bookkeeping, billing (TABS3 Legal Software)

Title2Land, LLC- Pre & Post Closing Secretary 8/2002 to 1/2004

Pre/Post Closing Secretary:

- Preparation of documents and closing packages for lenders and clients
- Recordation of documents (donations, cash sales, mortgages, and assignments) in multiple states
- Curative work for files, draft hold harmless affidavits, cancellations of liens and notes, and preparation of title commitments and policies (SoftPro Software)

Premier Title- Post Closing Supervisor 2/2000 to 6/2002

Post-Closing Supervisor:

- Responsible for all aspects of post-closing and drafting title commitments/policies
- Distribution of funds after the rescission period; preparation of accounting reports and data entry for accounts receivable and payable

Network Long Distance Company-Billing Administrator 8/1990 to 3/1999

Customer Service Representative, promoted to Billing Administrator:

- Supervisor over all aspects of the billing process from beginning to end, operation and maintenance of all office equipment, responsible for design and production of monthly flyers inserted with customers bills

EDUCATION

- 2013 Baton Rouge Community College – Associate Degree of Applied Science in Paralegal Studies
- 2010 Skillpath Seminars - Managing Multiple Projects
- 2009 Louisiana Notary Association - Real Estate Certified Signing and Closing Agent
- 2005 Skillpath Seminars - Indispensable Assistant
- 2005 Baton Rouge Community College - Accounting Fundamentals
- 2005 Fred Pryor Seminars - Administrative Assistants Time Management
- 2004 First American Title Company Insurance Company - Title Insurance/Real Estate Seminar
- 2004 Jones Walker Certification in Microsoft Word
- 2004 Jones Walker Introduction to Microsoft Excel and Power Point
- 2002 LSU – Notary Public Preparation Class- Commissioned Notary Public 2004
- 2001 Lafayette Regional Technical Institute - Notary/Real Estate Class
- 1994 Baton Rouge Technical Institute - Introductions to Microcomputers
- 1986-1989 LSU - Consumer Sciences (Human Resources/Family Life and Environment)
- 1974-1986 Wilkinson County Christian Academy - High School Honor Graduate & Beta Club

Harvey W. Cook

46008 Kate Street. Hammond LA 70401 9859690439.

hcook10595@charter.net

PROFESSIONAL SUMMARY

I have 30 years of transactional real estate experience. Both residential and commercial. I have been both the managing Attorney for another firm and owned my own Practice and Title Company. I am currently self-employed due to Covid.

SKILLS

- Critical thinking
- Social perceptiveness
- Time management
- Drafting legal documents
- Knowledgeable in all areas of law involving or affecting immovable property
- Proficient in Word, PowerPoint, adobe and Excel
- Researching and preparing abstracts of title.
- Title Examinations

EXPERIENCE

Senior Compliance Manager

February 2020 - October 2020

Altisource Solutions I, Plano, Texas

- Explained regulatory procedures in understandable terminology to non- technical individuals
- Conducted risk assessments and internal audits on surprise and scheduled timeframe basis.
- Identified vulnerabilities and areas of non-compliance and immediately implemented changes to promote improvement.
- Reviewed reports to determine compliance status within individual departments
- Assisted upper management and executives with development of compliance strategies
- Conducted investigations into reported and identified compliance issues to determine relevance and gather detailed information
- Identified compliance concerns with regular reviews of policies, procedures, and activities.
- Determined compliance monitoring effectiveness by testing systems and identifying weak points
- Completed both scheduled and surprise audits to verify compliance with established procedures.

Title Attorney

Harvey W. Cook, LLC

August 2012 -February 2020

- Conducted all title exams
- Abstracted properties
- Handled simple successions
- Drafted Wills
- Drafted residential and commercial leases
- Performed title curative work
- Real estate related litigation

Leader Title Company and Myles Law Firm
Hammond, Louisiana

May 1991-August 2012

Manager, Hammond, Louisiana location

- Supervised 7 staff members
- Experience conducting residential and commercial real estate closings
- Licensed title insurance agent
- Performed all title examinations in-house
- Abstracted properties
- Handled simple successions
- Drafted wills
- Drafted residential and commercial leases
- Performed necessary curative work to remove and title issues or objections
- Handled real estate related litigation

EDUCATION

- Juris Doctorate, Paul M Hebert Law Center, Louisiana State University, Baton Rouge, Louisiana, May 1991
- Bachelor of Arts, Louisiana College, Pineville, Louisiana, May 1985

DEBORAH BERTHELOT

ATTORNEY AT LAW

7922 Summa Ave, Ste A-3, Baton Rouge, Louisiana, 70809

Phone: Office (225) 924-9195; Fax (225) 924-9199; Cell (225) 324-3119 dberthelot@bigrivertitle.com

➤ EXPERIENCE

January 2005-present

Big River Title, LLC and Deborah Berthelot, LLC, 7922 Summa Ave, Ste A-3, Baton Rouge, Louisiana 70809

Operate full service law office and title company; Compile patent, acreage and subdivision abstracts; Examine title for residential, commercial, oil and gas and US government tracts; Title curative services; Draft simple wills, leases; File small successions; Attend HUD closings for large acreage tracts and medical facilities and comply with US underwriter requirements; Draft community property settlements; Draft business organizations; Execute sales of movable and immovable property; File title insurance claims; District and appellate litigation of tax sale defense suits and construction defects.

Litigation:

Trial, Oral argument. Represented defendant at the First Circuit and overturned/reversed plaintiff verdict, Dismissed with prejudice. *Investments 2234, LLC v Mary Lee Shavers Fortune*, (La. App. 2015)

Mineral Experience:

CLIENT: March 2018-Jan 2019

Daniels Land Services, Inc., 801 Dellwood St., Suite 100, PMB 140, Bryan, Texas 77802

Part-time examination and review of tracts for mineral leases. Draft descriptions. Pointe Coupee Parish.

CLIENT: January 2013-December 2014

Strata Acquisitions, LLC/Tag Galloway, 106A North Magnolia St., Hammond, Louisiana 70401

Run and compile oil and gas abstracts; Title curative; Examine Louisiana titles for status and legal issues; scan abstracts.

CLIENT: May 2010-July 2011; November 2017-February 2018

Pinebelt Energy/T. S. Dudley Land Company, Inc., 5925 North Robinson Avenue, Oklahoma City, Oklahoma 73118

Part-time examination and review of tracts for mineral leases; Identify landowners; Research ancillary issues of a legal nature; Draft authorizing documents; Enter information on ilandman program; Notarize leases; Review lease packages, Draft mineral reports for East Baton Rouge, East Feliciana and Pointe Coupee Parishes.

December 2010-December 2015 P/T; Sept 2018 -12/9/2019 P/T, 12/9/2019- present

City of Baton Rouge/Parish of East Baton Rouge

Examining attorney for East Baton Rouge Sewer Project, Perform title examinations for all tract owners/lessees; Locate parcels for rights of way; Draft title opinion letters for extremely large landholder tracts; Identify owners, tracts or issues for general contractors; Report to administration on status; Meet with engineering staff and order additional research when necessary; Meet with different project branches for status and projected goals. In Sept 2018, personally undertook comprehensive acquisitions database for Parish of EBR with cross references to enable staff to identify all properties owned by City-Parish and created another database linked to completed abstracts to avoid duplicated research. Other projects on demand involving title research, discovery and litigation support.

June 2001-December 2004

Law Offices of Stemmans & Alley, 668 South Foster Drive, Suite 101, Baton Rouge, Louisiana 70809

Conducted real estate closings; Drafted business documents including corporations, limited liability companies;

Conducted research, discovery and drafted documents for personal injury litigation; Attended hearings on child support, custody and divorce in Family Court; Attended Worker's Compensation hearings; Drafted wills; Filed successions;

Drafted collection suits and attended rules.

June 2000-June 2001

Attorney-Advisor: United States Army Corps of Engineers, 400 Leake Avenue, New Orleans, Louisiana

Drafted public contracts of expropriation, easement, and sale of real estate to US government;

Attended meetings of state and federal agencies for project compliance; Tract inspections by land and air.

November 1996-June 2000

Closing Attorney: Baton Rouge Title Company, 620 Florida Street , Baton Rouge, Louisiana 70802
Real Estate and Curative Work.

➤ **PROFESSIONAL LICENSES AND ASSOCIATIONS**

Louisiana State Bar Association,
Louisiana Association of Independent Land Title Agents/Licensed ALTA practitioner
Baton Rouge Independent Title Attorneys, Past Recording Secretary
Middle District of Louisiana (Federal)
Louisiana licensed title insurance agent and commissioned Notary Public
Certified Woman Owned Small Business
American Association of Professional Landmen
American Land Title Association

➤ **SKILLS**

Computer: Office, Outlook, Word, WordPerfect/Corel, Power Point, Excel, Landtech Closing Software,
Title Insurance: Experience with Commonwealth, Fidelity, First American, Stewart and WFG National Title Insurance
companies
Expert Witness
HUD: Experience with Section 232 Nursing Home and Multi-Family Insured closings

➤ **EDUCATION**

Masters of Business Administration (May, 2009), University of Phoenix
Juris Doctor Degree (May 1995); Paul M. Hebert Law Center, Louisiana State University; Baton Rouge, LA
Bachelor of Arts- History (Dec 1991); Louisiana State University; Baton Rouge, LA

➤ **PUBLICATIONS and CLASSES**

2002-2012 Annual Guest Speaker: Law Office Practice, LSU Law School-Prof. Winston DeCuir
The Process of Title Examination, NBI Seminar, Title Law in Louisiana, December 2009
The Quiet Title Suit-Genealogy, NBI Seminar, Real Estate Title Law: Problems and Solutions, March 2004
Title Examination, NBI Seminar, Real Estate Title Law: Problems and Solutions, March 2004
Administrative Bonds, NBI Seminar, 2006

PROFESSIONAL LIABILITY INSURANCE



TITLE INDUSTRY
ASSURANCE COMPANY
Risk Retention Group

**ABSTRACTERS, TITLE INSURANCE
AGENTS, AND ESCROW AGENTS
PROFESSIONAL LIABILITY INSURANCE**

Issue Date: 1/18/2022

CERTIFICATE OF INSURANCE

This is to certify that the policy of insurance listed below has been issued to the insured named below for the policy period indicated.

TYPE OF INSURANCE: Abstracters, Title Insurance Agents and Escrow Agents Professional Liability Insurance

INSURANCE COMPANY: Title Industry Assurance Company (TIAC)

POLICY NUMBER: TIAC155144-22

INSURED: Big River Title, LLC
7922 Summa Ave Ste A3
Baton Rouge, LA 70809-3475

LIMIT OF LIABILITY: Per claim: \$1,000,000
Annual Aggregate: \$1,000,000

EFFECTIVE: 1/15/2022 TO: 1/15/2023

This certificate is issued as a matter of information only and confers no rights upon any person or entity. This certificate does not amend, extend or alter the coverage provided by the policy. Notwithstanding any requirement, term or condition of any contract with respect to which this certificate may be issued or may pertain, the insurance provided by this policy is subject to all the terms, exclusions and conditions of the policy.

By issuance of this certificate, the insurance company assumes no obligation to provide notice of change in or cancellation of the policy, and assumes no responsibility arising out of any alteration or modification of this certificate by any person or entity.

Signature of Authorized Representative



TITLE INDUSTRY
ASSURANCE COMPANY
Risk Retention Group

7501 Wisconsin Avenue, Suite 1500E • Bethesda, MD 20814-6522 • 800-628-5136 / FAX: 800-TIAC-FAX

January 19, 2022

Deborah Berthelot
Big River Title, LLC
7922 Summa Ave Ste A3
Baton Rouge, LA 70809-3475

RE: Title Agents and Abstracters Errors & Omissions Liability Insurance
Policy Number: TIAC155144-22
Effective Date: 1/15/2022

ID#: TIA-0000011320

Dear Ms. Berthelot:

In accordance with your recent instructions, we are pleased to enclose your Title Industry Assurance Company (TIAC) Professional Liability policy. Coverage is provided on a claims-made basis. The Declarations page and endorsements with the policy terms and conditions are being emailed to you.

It is your responsibility to review the policy and endorsements for accuracy and completeness prior to placing in your files. If you have chosen to purchase the Client Funds Protection Endorsement please review the endorsement for reporting requirements in the event of a wire fraud claim.

Also enclosed is a new TIAC Certificate of Insurance. Many TIAC insureds have asked us to provide Certificates of Insurance for clients or lenders who request evidence of Title Agents and Abstracters Professional Liability Insurance. Please keep the original in a safe place with the policy and feel free to make *photocopies* whenever evidence of coverage is required. The copies can be "*customized*" if needed by typing "**Certificate Holder:**" and the name and address of the "Certificate Holder: in the blank area at the margin below the signature. No other changes are authorized.

Your order for coverage with TIAC confirms your commitment to a professional liability program created by the American Land Title Association (ALTA) to meet your special needs.

HOW TO REPORT A CLAIM: Enclosed are a claims guide and **Incident/Claim Report Form** that provide detailed information on what to do in the event of an E&O claim.

It is indeed a pleasure to provide this valuable protection for your firm. If you have any questions, or if we can be of further assistance, please call us at 800-628-5136.

Cordially,

Victoria M. Crowe
Program Manager

VMC:pc



TITLE INDUSTRY
ASSURANCE COMPANY
Risk Retention Group

ABSTRACTERS, TITLE INSURANCE
AGENTS, AND ESCROW AGENTS
PROFESSIONAL LIABILITY INSURANCE

DECLARATIONS

Claims Made And Reported Policy: This policy is limited to liability only for those CLAIMS THAT ARE FIRST MADE AGAINST THE INSURED AND REPORTED DURING THE POLICY PERIOD OR DURING THE EXTENDED REPORTING PERIOD. No coverage exists for claims first made against the insured prior to the policy period or after the end of the policy period unless, and to the extent, an extended reporting period applies.

POLICY NUMBER: TIAC155144-22

RENEWAL OF: TIAC155144-21

1. NAMED INSURED AND MAILING ADDRESS:

Big River Title, LLC
7922 Summa Ave Ste A3
Baton Rouge, LA 70809-3475

2. TYPE OF FIRM: Limited Liability Corporation

3. POLICY PERIOD: 1/15/2022 to: 1/15/2023 at 12:01 A.M.
Standard Time at the address of the Named Insured shown above.

4. LIMITS OF LIABILITY AND DEDUCTIBLE:

Limits:	\$1,000,000	Each Claim	/	\$1,000,000	Policy Aggregate
Deductible:	\$2,500	Each Claim	/	\$7,500	Aggregate Each Policy Period

5. FIRST COVERAGE DATE: 1/15/2019 PRIOR ACTS DATE: 1/22/2002

6. PREMIUM: \$2,733.00

7. FORMS ATTACHED AT EFFECTIVE DATE:

TIAC-1	Abstracters, Title Insurance Agents and Escrow Agents Professional Liability Insurance Policy (05/2015 Ed.)
TIA001	Prior Acts Limitation Endorsement
TIA016	Client Funds Protection Coverage Endorsement
TIA017	Privacy Breach Mitigation Expense Endorsement
TIA031	Deductible Reduction Endorsement - Escrow Trust Account Verification and Control
TIA006	Certificate of Insurance

NOTICE: THIS POLICY IS ISSUED BY YOUR RISK RETENTION GROUP. YOUR RISK RETENTION GROUP MAY NOT BE SUBJECT TO ALL OF THE INSURANCE LAWS AND REGULATIONS OF YOUR STATE. STATE INSURANCE GUARANTY FUNDS ARE NOT AVAILABLE FOR YOUR RISK RETENTION GROUP.

Signature of Authorized Representative



TITLE INDUSTRY
ASSURANCE COMPANY
Risk Retention Group

**ABSTRACTERS, TITLE INSURANCE
AGENTS, AND ESCROW AGENTS
PROFESSIONAL LIABILITY INSURANCE**

NAMED INSURED: **Big River Title, LLC**

POLICY: TIAC155144-22

EFFECTIVE: 1/15/2022

ENDORSEMENT NUMBER: 1

PRIOR ACTS LIMITATION ENDORSEMENT

In consideration of the premium charged, it is understood and agreed that Section A. COVERAGE, subparagraph 1. (b) is deleted in its entirety and replaced by the following:

(b) on or after the Prior Acts Date stated below and in the Declarations, provided that on the First Coverage Date shown in the Declarations, no **Insured** had knowledge of such **Wrongful Act**;

Prior Acts Date: 1/22/2002

This endorsement changes the policy. Please read it carefully.

All other terms, conditions, and exclusions remain unchanged.

Signature of Authorized Representative



NAMED INSURED: **Big River Title, LLC**

POLICY: TIAC155144-22

EFFECTIVE: 1/15/2022

ENDORSEMENT NUMBER: 2

CLIENT FUNDS PROTECTION COVERAGE ENDORSEMENT

In consideration of the premium charged, it is understood and agreed that the policy is amended as follows:

Sublimit of Liability:

Client Funds Protection Coverage Policy Aggregate

Sublimit of Liability: **\$100,000**

A. CLIENT FUNDS PROTECTION COVERAGE INSURANCE AGREEMENT

1. Subject to the sublimit of liability for Client Funds Protection Coverage set forth in this endorsement, the **Company** shall reimburse the Named Insured for loss, during the **Policy Period**, of client or customer funds as a result of theft or conversion of such funds other than by an **Insured** or by a **Person or Entity Affiliated With An Insured**.
2. The Client Funds Protection Coverage provided by this endorsement applies only to loss of client or customer funds during the **Policy Period**. The policy upon which this Client Funds Protection is endorsed otherwise provides claims made and reported coverage.
3. The sublimit of liability for Client Funds Protection Coverage set forth in this endorsement is part of and not in addition to the policy limits of liability stated in the Declarations and is the only limit of liability for **Claims** or **Claims Expenses** arising out of the loss of client or customer funds provided by the policy.
4. Notice of the loss of client or customer funds with respect to which the Named Insured seeks coverage under this endorsement for Client Funds protection Coverage must be reported to the **Company** as provided in this endorsement.
5. **Claims Expenses** incurred in connection with a loss of client or customer funds shall be part of and not in addition to the sublimit of liability for Client Funds Protection Coverage provided by this endorsement.

B. DEFINITIONS

1. **Person Affiliated With An Insured** shall mean any person related to an **Insured** by birth, adoption, marriage, or civil union (including spouses, civil union partners, parents, grandparents, children, grandchildren, siblings, cousins, nieces, nephews, aunts, or uncles).
2. **Entity Affiliated With An Insured** shall mean (i) any entity controlled by an **Insured** or by a **Person Affiliated With An Insured**; and (ii) any entity in which any **Insured** or a **Person Affiliated With An Insured** has or at any time had a legal or beneficial interest.



3. **Person or Entity Affiliated With An Insured** shall mean any **Person Affiliated With An Insured** and/or any **Entity Affiliated With An Insured**.

C. EXCLUSIONS

1. This Client Funds Protection Coverage does not apply to any **Claims** or **Claims Expenses** based upon or directly or indirectly arising out of, or in any way involving, or relating in any way to: any defalcation, theft, embezzlement, conversion, or misappropriation of client or customer funds that occurred prior to the **Policy Period**, whether or not known to any **Insured** prior to the **Policy Period**.
2. This Client Funds Protection Coverage does not apply to any **Claims** or **Claims Expenses** based upon or directly or indirectly arising out of, or in any way involving, or relating in any way to: any defalcation, theft, embezzlement, conversion, or misappropriation of client or customer funds of which any **Insured** had knowledge at the time of or prior to such defalcation, theft, embezzlement, conversion or misappropriation of client or customer funds.
3. Solely for purposes of this Client Funds Protection Coverage, policy exclusion D. 10. Is amended to read: "any defalcation, theft, embezzlement, conversion, or misappropriation of client or customer funds by an **Insured** and/or by a **Person or Entity Affiliated With An Insured**". Policy exclusion D.10. remains unchanged and in full force and effect with respect to any other coverage afforded by the policy.
4. This Client Funds Protection Coverage Does not apply to any loss of client or customer funds or to any **Claims** or **Claims Expenses** based upon or directly or indirectly arising out of, or in any way involving, or relating in any way to any loss of client or customer funds during any extended reporting period.

D. NOTICE

1. As condition precedent to the coverage afforded by this endorsement, the Named Insured shall give written notice to the **Company**, as soon as practicable and in no event later than fourteen (14) days after any **Insured** becomes aware of the loss of client or customer funds. Notice must be provided during the **Policy Period** or within fourteen (14) days after the end of the **Policy Period**, of any loss of client or customer funds with respect to which the Named Insured seeks coverage under this endorsement for Client funds Protection Coverage.
2. As a condition precedent to the coverage afforded by this endorsement, the Named Insured must obtain the **Company's** written consent prior to the incurrence of any costs of any type, including any reimbursement of client or customer funds, for which the Named Insured seeks coverage under this Client Funds Protection Coverage.



E. CONDITIONS

1. It is understood and agreed that the **Company** shall not be liable under this endorsement for Client Funds Protection Coverage for which an **Insured** has coverage under any insurance policy other than the policy to which this endorsement is attached.
2. The sublimit of liability for Client Funds Protection Coverage set forth in this endorsement is part of and not in addition to the policy limits of liability stated in the Declarations and is the only limit of liability for Client Funds Protection Coverage afforded by the policy.
3. All **Insureds** shall cooperate with the **Company** in connection with investigation of any loss of client or customer funds, including the provision to any law enforcement or government agency of notice or reports of the loss of client or customer funds. All **Insureds** shall cooperate with any law enforcement or government agency in the investigation of any loss of client or customer funds.

This endorsement changes the policy. Please read it carefully.

All other terms, conditions, and exclusions remain unchanged.

Signature of Authorized Representative



TITLE INDUSTRY
ASSURANCE COMPANY
Risk Retention Group

ABSTRACTERS, TITLE INSURANCE
AGENTS, AND ESCROW AGENTS
PROFESSIONAL LIABILITY INSURANCE

NAMED INSURED: **Big River Title, LLC**

POLICY: TIAC155144-22

EFFECTIVE: 1/15/2022

ENDORSEMENT NUMBER: 3

PRIVACY BREACH MITIGATION EXPENSE ENDORSEMENT

In consideration of the premium charged, it is understood and agreed that the policy is amended as follows:

Sublimits of Liability:

Privacy Breach Mitigation Expense Each Unintentional Data Breach
Sublimit of Liability: \$25,000

Privacy Breach Mitigation Expense Policy Aggregate
Sublimit of Liability: \$50,000

A. PRIVACY BREACH MITIGATION EXPENSE INSURING AGREEMENT

1. The Privacy Breach Mitigation Expense Coverage provided by this endorsement is occurrence coverage. The policy upon which this coverage is endorsed otherwise provides claims made and reported coverage.
2. Subject to the sublimits of liability set forth above, the **Company** shall reimburse the Named Insured for the reasonable costs actually incurred and paid by the Named Insured, with the prior written consent of the **Company**, for **Privacy Breach Mitigation Expense** that results directly from an **Unintentional Data Breach**, the entirety of which **Unintentional Data Breach** occurs during the **Policy Period** and is reported to the **Company** as provided in this endorsement.
3. The sublimits of liability for **Privacy Breach Mitigation Expense** set forth in this endorsement are part of and not in addition to the policy limits of liability stated in the Declarations and are the only limits of liability for **Privacy Breach Mitigation Expense** afforded by the policy.
4. Notice of the **Unintentional Data Breach** with respect to which the Named Insured seeks coverage under this endorsement for **Privacy Breach Mitigation Expense** must be reported to the **Company** as provided in this endorsement.

B. DEFINITIONS

1. **Data Breach** means the actual release of **Nonpublic Personal Information** whether by electronic means or in paper format.
2. **Nonpublic Personal Information** means any private personal information as defined under any **Privacy Breach Notice Law** regarding the security and privacy of personal information, including the Gramm-Leach-Bliley Act of 1999, as amended (15 U.S.C. sec. 6801-6809). **Nonpublic Personal Information** does not include any information lawfully available to or accessible by the general public.



3. **Privacy Breach Mitigation Expense** means reasonable costs actually incurred by the Named Insured, with the prior written consent of the **Company**, to provide notification pursuant to a **Privacy Breach Notice Law**, that a person's **Nonpublic Personal Information** has been the subject of an **Unintentional Data Breach**. **Privacy Breach Mitigation Expense** does not include: (a) costs to design, upgrade, modify, maintain, or correct any deficiencies in any computer system used or maintained by the **Insured**; (b) salaries, wages, (including overtime wages), or fees of any employee of an **Insured**; (c) the costs of or fees paid for use of any computer system whether or not owned by an **Insured**; and/or (d) fines or penalties (including statutory penalties) of any kind.
4. **Privacy Breach Notice Law** means any state or federal law or regulation that requires the Named Insured to notify a person of the actual or possible compromise or disclosure of the person's **Nonpublic Personal Information**.
5. **Unintentional Data Breach** means the actual, unintentional release of **Nonpublic Personal Information** whether by electronic means or in paper format.

C. EXCLUSIONS

The coverage afforded by the Privacy Breach Mitigation Expense Insuring Agreement does not apply to:

1. Any intentional **Data Breach** or intentional release by any **Insured of Nonpublic Personal Information** or intentional violation by any **Insured of any Privacy Breach Notice Law**;
2. Any release of **Nonpublic Personal Information** to comply with any order or regulation of the federal or any state government, or that results from any access by the federal or any state government or any agency or agent of the federal or any state government to an **Insured's** records maintained in either electronic or paper format.
3. Any **Data Breach** or **Unintentional Data Breach** or other release of **Nonpublic Personal Information** that results from use of illegal, unauthorized, or unlicensed software or programs.
4. Any **Data Breach** or **Unintentional Data Breach** that occurred, in whole or in part, prior to the **Policy Period**, even if: (a) such **Data Breach** or **Unintentional Data Breach** continued during the **Policy Period** and/or (b) no **Insured** was aware of such **Data Breach** or **Unintentional Data Breach** prior to the **Policy Period**.

D. NOTICE

1. As a condition precedent to the coverage afforded by this endorsement, the Named Insured shall give written notice to the **Company**, as soon as practicable and during the **Policy Period** or within thirty (30) days after the end of the **Policy Period**, of any **Unintentional Data Breach** with respect to which the Named Insured seeks coverage under this endorsement for **Privacy Breach Mitigation Expense**.
2. As a condition precedent to the coverage afforded by this endorsement, the Named Insured must obtain the **Company's** prior written consent to the incurrence of any **Privacy Breach Mitigation Expense** for which the Named Insured seeks coverage under this endorsement.



TITLE INDUSTRY
ASSURANCE COMPANY
Risk Retention Group

ABSTRACTERS, TITLE INSURANCE
AGENTS, AND ESCROW AGENTS
PROFESSIONAL LIABILITY INSURANCE

E. CONDITIONS

1. It is understood and agreed that the **Company** shall not be liable under this endorsement for reimbursement of any **Privacy Breach Mitigation Expense** for which an **Insured** has coverage under any insurance policy other than the policy to which this endorsement is attached.
2. The sublimits of liability for **Privacy Breach Mitigation Expense** set forth in this endorsement are part of and not in addition to the policy limits of liability stated in the Declarations and are the only limits of liability for **Privacy Breach Mitigation Expense** afforded by the policy.
3. Two or more related **Unintentional Data Breaches** shall be treated for purposes of the coverage afforded by this endorsement as a single **Unintentional Data Breach** and shall be subject to the **Privacy Breach Mitigation Expense Each Unintentional Data Breach Sublimit of Liability**. The **Privacy Breach Mitigation Expense Each Unintentional Data Breach Sublimit of Liability** applies to **Privacy Breach Mitigation Expense** for any single **Unintentional Data Breach** regardless of the number of persons whose **Nonpublic Personal Information** is released.
4. Upon request by the **Company**, the Named Insured shall permit the **Company** or its representatives to inspect any computer system with respect to which the Named Insured has sought coverage under this endorsement for **Privacy Breach Mitigation Expense**.

This endorsement changes the policy. Please read it carefully.

All other terms, conditions, and exclusions remain unchanged.

Signature of Authorized Representative



TITLE INDUSTRY
ASSURANCE COMPANY
Risk Retention Group

ABSTRACTERS, TITLE INSURANCE
AGENTS, AND ESCROW AGENTS
PROFESSIONAL LIABILITY INSURANCE

NAMED INSURED: **Big River Title, LLC**

POLICY: TIAC155144-22

EFFECTIVE: 1/15/2022

ENDORSEMENT NUMBER: 4

ESCROW TRUST ACCOUNT VERIFICATION AND CONTROL DEDUCTIBLE REDUCTION ENDORSEMENT

In consideration of the premium charged, it is understood and agreed that in the event of a **Claim** alleging a **Wrongful Act** by the **Insured** solely involving the failure to safeguard funds, the deductible applying to that **Claim** will be reduced by 50% if the following procedures and controls for escrow trust accounts were in effect at the time of the alleged **Wrongful Act**:

1. All procedures required to comply with Pillar 2 of the American Land Title Association's Title Insurance and Settlement Company Best Practices;
2. Escrow trust accounts undergo automated three-way reconciliation daily with reports continually available for review and auditing by the **Insured** and the **Insured's** title underwriter(s); and
3. **Insured's** title underwriter(s) granted open access to **Insured's** escrow accounting and related banking records so daily file balances, receipts, disbursements and reconciliations can be electronically verified at any time without the **Insured's** interaction.

This endorsement changes the policy. Please read it carefully.

All other terms, conditions, and exclusions remain unchanged.

Signature of Authorized Representative



JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

JEFFERSON PARISH VENDOR REGISTRATION FORM

All vendors interested in submitting bids, or proposals to provide equipment, materials, supplies, services or performing major repairs/construction for Jefferson Parish must complete this form and indicate commodity codes applicable to their business. This application **MUST** be accompanied with vendor's signed W-9 Form (or W-8IMY Form if an international vendor) and a listing of applicable commodity codes. This application will not be processed otherwise. In order to receive payments within one (1) day of payment processing, please complete Vendor Direct Deposit Form available online at <http://purchasing.jeffparish.net> and email to Purchasing@jeffparish.net. If a Vendor Direct Deposit Form is not received, you will receive a paper check via the mail.

Name of Business: Big River Title LLC		
Physical Address: 7922 Summa Ave, #A-3		Remittance Address: same
City: Baton Rouge	State: LA	Zip: 70809
Phone Number () 225-924-9195	Fax Number: () 225-924-9199	
Email Address (REQUIRED): dberthelot@bigrivertitle.com		Federal Identification Number (REQUIRED): 71-0884761
Nature of Business: Abstracts, title insurance, title transfers		
Trade, Specialty, or Professional Licenses: Juris Doctorate		

Please check one:

Corporation: ☐ Individual: ☐ Partnership: ☐ Other: ☒ **LLC**

Authorized to do Business in Louisiana: Yes: ☒ No: ☐

PAGE 1 of 3

JOSEPH S. YENNI BUILDING - 1221 ELMWOOD PARK BLVD - SUITE 404 - JEFFERSON, LA 70123 - PO BOX 10242 JEFFERSON, LA 70181-0242
OFFICE 504.364-2678

GENERAL GOVERNMENT BUILDING - 200 DERBIGNY ST - SUITE 4400 - GRETN, LA 70053 - PO BOX 9 - GRETN - LA 70054
OFFICE 504.364.2678

EMAIL: PURCHASING@JEFFPARISH.NET

WEBSITE: WWW.JEFFPARISH.NET



JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

Jefferson Parish strongly encourages the involvement of minority and/or woman-owned business enterprises (DBE's including, MBE's, WBE's and SBE's) to stimulate participation in procurement and assistance programs. Please indicate below as applicable:

DBE: ☐ MBE: ☐ WBE: ☒ SBE: ☐

Vendors registering to conduct business with Jefferson Parish hereby acknowledge that upon bid/proposal submission, vendors agree to comply with all provisions of Louisiana Law as well compliance with the Jefferson Parish Code of Ordinances, Louisiana Code of Ethics as well as applicable Jefferson Parish ethical standards and Jefferson Parish standard terms and conditions. Further, it shall be the duty of every applicant for certification of eligibility for a parish contractor or program to cooperate with the Inspector General in any investigation, audit, inspection, performance review, or hearing pursuant to Jefferson Parish Code of Ordinances Section 2-155.10 (19). By submitting a bid, vendor acknowledges this and will abide by all provisions of the referenced Jefferson Parish Code of Ordinances.

Vendor Contact Name: Deborah Berthelot	Title: Manager
Signature:	Date:

Prospective bidders are strongly encouraged to register for our e-procurement web portal. All bids are uploaded onto this portal for review and response. There is no cost to register, view, download and submit bids. For more information on this and other bid information, please visit the Jefferson Parish Purchasing Department webpage located at <http://purchasing.jeffparish.net> or you can directly go to our e-procurement portal at www.jeffparishbids.net. Vendors will be automatically notified of solicitations for commodities which they have registered to receive.

Jefferson Parish uses the National Institute for Governmental Procurement Commodity Codes to notify prospective bidders of solicitations to which they would be interested in. By selecting the appropriate commodity codes and listing them on Page 3 of this application, prospective bidders may be notified of current solicitations. Please go to at <http://purchasing.jeffparish.net> for a complete list of commodity codes and enter in the form below.



JEFFERSON PARISH

DEPARTMENT OF PURCHASING

CYNTHIA LEE SHENG
PARISH PRESIDENT

RENNY SIMNO
DIRECTOR

COMMODITY CODE ENROLLMENT

COMMODITY	COMMODITY DESCRIPTION
abstracts	research on land for sale, mortgage or condemnation
title insurance	insurance on title to land being sold or mortgaged

Request for Taxpayer Identification Number and Certification

Give Form to the
requester. Do not
send to the IRS.

► Go to www.irs.gov/FormW9 for instructions and the latest information.

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.	
2 Business name/disregarded entity name, if different from above Big River Title LLC	
3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following seven boxes. <input checked="" type="checkbox"/> Individual/sole proprietor or single-member LLC <input checked="" type="checkbox"/> Limited liability company. Enter the tax classification (C=C corporation, S=S corporation, P=Partnership) ► P Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner. <input type="checkbox"/> Other (see instructions) ►	4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3): Exempt payee code (if any) _____ Exemption from FATCA reporting code (if any) _____ <small>(Applies to accounts maintained outside the U.S.)</small>
5 Address (number, street, and apt. or suite no.) See instructions. 7922 Summa Ave, Ste A-3	Requester's name and address (optional)
6 City, state, and ZIP code Baton Rouge LA 70809	
7 List account number(s) here (optional)	

Part I Taxpayer Identification Number (TIN)

Enter your TIN in the appropriate box. The TIN provided must match the name given on line 1 to avoid backup withholding. For individuals, this is generally your social security number (SSN). However, for a resident alien, sole proprietor, or disregarded entity, see the Instructions for Part I, later. For other entities, it is your employer identification number (EIN). If you do not have a number, see *How to get a TIN*, later.

Note: If the account is in more than one name, see the instructions for line 1. Also see *What Name and Number To Give the Requester* for guidelines on whose number to enter.

Social security number								
			-				-	
or								
Employer identification number								
7	1		-	0	8	8	4	7 6 1

Part II Certification

Under penalties of perjury, I certify that:

- The number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
- I am not subject to backup withholding because: (a) I am exempt from backup withholding, or (b) I have not been notified by the Internal Revenue Service (IRS) that I am subject to backup withholding as a result of a failure to report all interest or dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding; and
- I am a U.S. citizen or other U.S. person (defined below); and
- The FATCA code(s) entered on this form (if any) indicating that I am exempt from FATCA reporting is correct.

Certification instructions. You must cross out item 2 above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return. For real estate transactions, item 2 does not apply. For mortgage interest paid, acquisition or abandonment of secured property, cancellation of debt, contributions to an individual retirement arrangement (IRA), and generally, payments other than interest and dividends, you are not required to sign the certification, but you must provide your correct TIN. See the instructions for Part II, later.

Sign
Here

Signature of
U.S. person ►

Date ►

General Instructions

Section references are to the Internal Revenue Code unless otherwise noted.

Future developments. For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted after they were published, go to www.irs.gov/FormW9.

Purpose of Form

An individual or entity (Form W-9 requester) who is required to file an information return with the IRS must obtain your correct taxpayer identification number (TIN) which may be your social security number (SSN), individual taxpayer identification number (ITIN), adoption taxpayer identification number (ATIN), or employer identification number (EIN), to report on an information return the amount paid to you, or other amount reportable on an information return. Examples of information returns include, but are not limited to, the following.

- Form 1099-INT (Interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
 - Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
 - Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
 - Form 1099-S (proceeds from real estate transactions)
 - Form 1099-K (merchant card and third party network transactions)
 - Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
 - Form 1099-C (canceled debt)
 - Form 1099-A (acquisition or abandonment of secured property)
- Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

If you do not return Form W-9 to the requester with a TIN, you might be subject to backup withholding. See What Is backup withholding, later.