

CBRE, Inc. Response to City of Crestview, FL  
**RFP 25-02-27-FS: Real Estate and Property Management Services**  
Confidential Information

The Florida Legislature has created an express exemption for trade secret materials of private parties that government entities may find themselves in possession of. Section 815.045, Florida Statutes, provides that:

The Legislature finds that **it is a public necessity that trade secret information as defined in s. 812.081, and as provided for in s. 815.04(3), be expressly made confidential and exempt from the public records law because it is a felony to disclose such records.** Due to the legal uncertainty as to whether a public employee would be protected from a felony conviction if otherwise complying with chapter 119, and with s. 24(a), Art. I of the State Constitution, it is imperative that a public records exemption be created. The Legislature in making disclosure of trade secrets a crime has clearly established the importance attached to trade secret protection. **Disclosing trade secrets in an agency's possession would negatively impact the business interests of those providing an agency such trade secrets by damaging them in the marketplace, and those entities and individuals disclosing such trade secrets would hesitate to cooperate with that agency, which would impair the effective and efficient administration of governmental functions.** Thus, the public and private harm in disclosing trade secrets significantly outweighs any public benefit derived from disclosure, and the public's ability to scrutinize and monitor agency action is not diminished by nondisclosure of trade secrets. [Emphasis added.]

By this letter, the City of Crestview, Florida and its Procurement Division ("the City") is on notice that the information redacted from CBRE's Response to Request for Proposal 25-02-27-FS: Real Estate and Property Management Services constitutes trade secrets of CBRE exempt from public records disclosure. Accordingly, the City is barred by Florida Statute from releasing the unredacted CBRE submission containing trade secrets of CBRE. Indeed, as the Legislature recognized in enacting section 815.045, criminal liability may attach to doing so. While the City may not, by law, release CBRE's unredacted submissions, CBRE does not object to the City releasing the **redacted** submission that we are transmitting to you with this letter.

Specifically, the following sections of CBRE's response have been redacted as trade secrets:

- A: Firm Qualifications and Experience. The information contained in this section contains sample work-product from CBRE, and reveals the approach and strategy developed by CBRE, as well as a confidential customer list and information regarding CBRE's intellectual property. This information reveals individuals proposed for CBRE's team and CBRE's staffing strategy for the project. This information is maintained as secret and not publicly disseminated by CBRE, and if publicly released would provide CBRE's competitors with a competitive advantage through insight

**RFP 25-02-27-FS: Real Estate and Property Management Services**

Confidential Information

into CBRE's staffing strategy for projects of this nature and potentially empower competitors to attempt to poach CBRE staff.

- B: Similar Projects Past Performance: This information reveals a confidential customer list and information regarding CBRE's intellectual property. This information is maintained as secret and not publicly disseminated by CBRE, and would provide CBRE's competitors with a competitive advantage through insight into CBRE's business strategy and intellectual property if publicly released.
- C: Project Approach/Work plan: The information contained in this section contains sample work-product from CBRE, and reveals the approach and strategy developed by CBRE. This information is maintained as secret and not publicly disseminated by CBRE, and would provide CBRE's competitors with a competitive advantage through insight into CBRE's business strategy and intellectual property if publicly released.
- D: Additional Information: The information contained in this section contains sample work-product from CBRE, and reveals the approach and strategy developed by CBRE, as well as a confidential customer list and information regarding CBRE's intellectual property. This information is maintained as secret and not publicly disseminated by CBRE, and would provide CBRE's competitors with a competitive advantage through insight into CBRE's business strategy and intellectual property if publicly released. In addition this information reveals individuals proposed for CBRE's team and CBRE's staffing strategy for the project. This information is maintained as secret and not publicly disseminated by CBRE, and if publicly released would provide CBRE's competitors with a competitive advantage through insight into CBRE's staffing strategy for projects of this nature and potentially empower competitors to attempt to poach CBRE staff.
- Attachment: Fee Schedule, Selected Content. This information details the compensation that would be charged by CBRE for the work. This type of financial and pricing strategy information constitutes a trade secret of CBRE, is also maintained as secret and is not publicly disseminated by CBRE, and if publicly released would provide CBRE's competitors with a competitive advantage through knowledge of CBRE's pricing strategy when competing for similar projects in the future.

CBRE trusts that the City and the Procurement Division will follow its statutory duty to maintain CBRE's trade secret information contained within CBRE's unredacted submission as confidential. It is of the utmost importance that CBRE's trade secrets not be improperly released, as CBRE would suffer irreparable harm if its trade secrets were to be improperly distributed to CBRE's competitors and the public at large.



REQUEST FOR PROPOSAL - RFP: 25-02-27-FS

FEBRUARY 27, 2025

# Real Estate and Property Management Services

CITY OF CRESTVIEW, FLORIDA



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**CBRE**





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# A

CBRE



## Firm Qualifications and Experience

1. The cover letter shall provide a summary of the services to be provided, list the project manager/key point of contact, and explain the primary reason why the Proposer would be the best choice for the contract. The cover letter must be signed by an authorized officer or employee of the firm who has authority to negotiate and contractually bind the organization. The title of the authorized officer or employee, their name, address, e-mail, and phone number must be included. The City intends to correspond only with Proposer's authorized officer or employee for all correspondence regarding this RFP. Submitting accurate and updated contact information is the responsibility of the Proposer. Obligations committed by such signatures shall be binding.

February 27, 2025

Heather Sutton  
City of Crestview - City Hall  
198 N Wilson St  
Crestview, FL 32536  
850 682 8077  
heathersutton@cityofcrestview.org

**CBRE**

CBRE, Inc.  
Brokerage Services  
  
600 Grand Blvd  
Miramar Beach, FL 32550

Re: RFP: 25-02-27-FS Real Estate and Property Management Services

Dear Ms. Sutton,

On behalf of CBRE, Inc. (CBRE), thank you for the opportunity to respond to your RFP for Real Estate and Property Management Services. We are delighted to have the opportunity to present our qualifications and express our sincere hope to represent and advise you on your projects.

CBRE offers the City of Crestview an ideal value proposition—local experts who represented [REDACTED] in sales and leasing of commercial properties in the Florida Panhandle in 2024, property management expertise backed by a world class management platform and the resources, expertise, and service approach of the world's leading commercial real estate services provider. In addition, our team on this proposal specializes in representing government clients in their commercial real estate transactions in support of mission-critical service delivery. As part of this process and in this proposal CBRE offers:

- Professionals from our Public Institutions & Education Solutions team, specializing in providing acquisition and development services to public sector clients such as Bay County, Pinellas County, the City of Naples and the State of Florida. We understand the public sector process, need for transparency, bond issues, Board requirements, and public engagement concerns and are prepared to support you throughout this project. CBRE reserves the right to review and comment on contract terms and provisions if we are your selected vendor.
- Market leading brokerage specialists from our Advisory & Transaction Services platform transacting over [REDACTED] transactions in the Panhandle in 2024, providing the best available market intelligence and insights to put the City of Crestview in the optimal position to acquire/dispose of/lease property while limiting your risk and costs in the project.
- Management services for your properties will be delivered by an experienced local team with a history of strong operational results and tenant satisfaction from the #1 commercial property management firm in the industry.
- A corporate culture in support of your values of social equity, inclusion, and justice. At CBRE, we take our leadership role in the real estate industry to heart. We recognize the impact we have on our communities, clients, employees and stakeholders. Our initiatives are key to building a more just and sustainable future that includes everyone.



As Managing Director of CBRE's Jacksonville/Northwest Florida offices, I am authorized to sign this proposal and any resulting contract on the company's behalf. Please contact Lee Ann Korst, our Account Lead for this contract at **+1 850 251 9319 and [leeann.korst@cbre.com](mailto:leeann.korst@cbre.com)** with any next steps. We are excited about this project and confident that we can substantially support and catalyze your process to achieve your service delivery goals for your citizens and stakeholders.

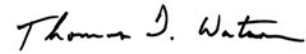
Sincerely,



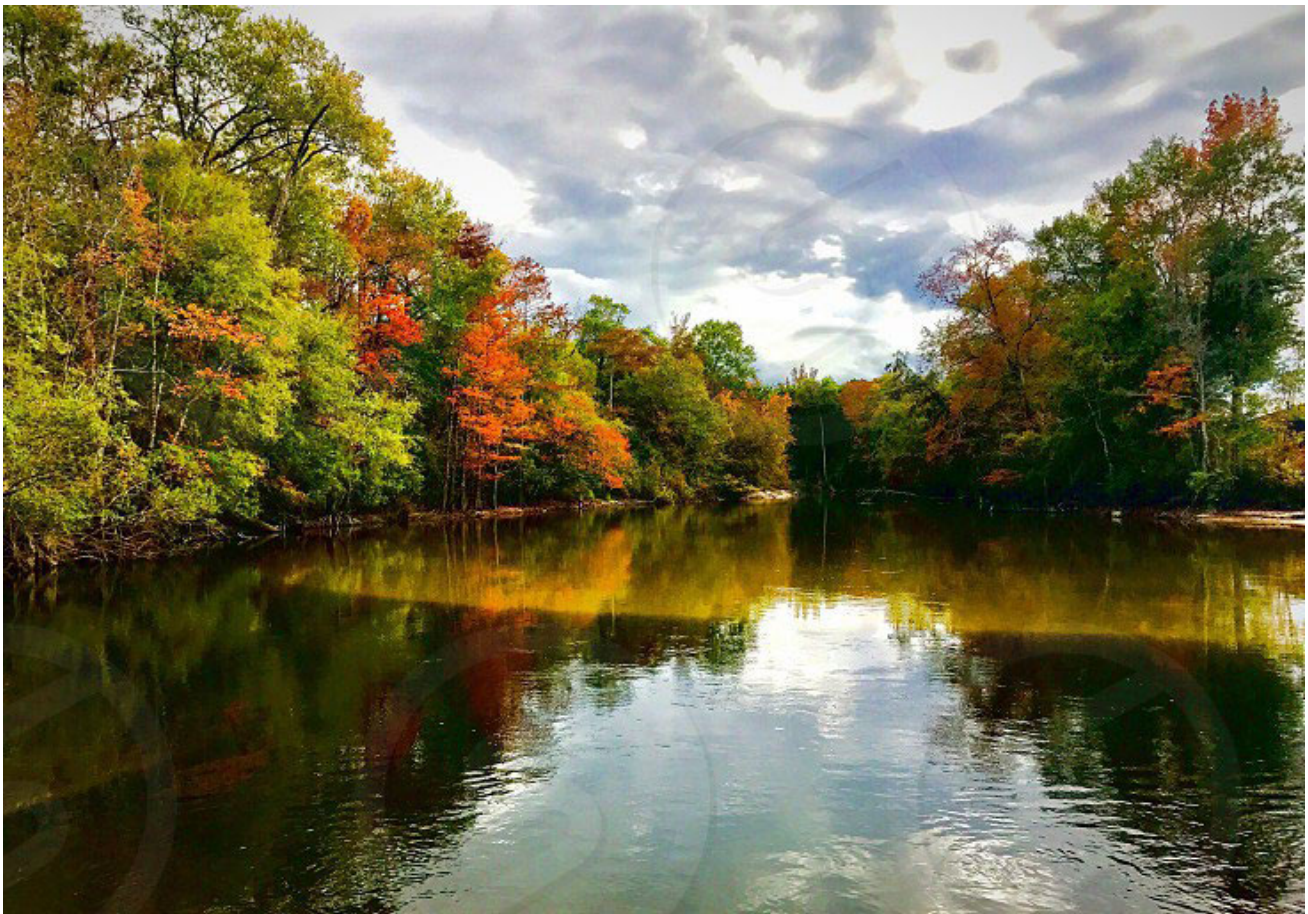
Managing Director  
CBRE Jacksonville/NW Florida



Lee Ann Korst  
Senior Vice President  
Southeast Regional Manager



Tom Watson  
Senior Vice President  
Advisory & Transaction Services





## 2. Corporate Background Information (2 pages maximum)

- Legal name, address, and telephone numbers of the principal office (national headquarters), project office and local office (if applicable). If services will be provided from additional locations, provide this same information for these offices.
- Year established.
- Type of organization (partnership, corporation, etc.).
- Name, title, address, e-mail, and telephone number of the person to whom correspondence shall be directed
- Description of the services usually provided by firm.
- Description of projects performed for agencies in the State of Florida during the last 3 years.

CBRE Group, Inc. (NYSE:CBRE) is the world's largest commercial real estate services and investment firm, with the #1 global market position in leasing, property sales, property management, occupier outsourcing and valuation. Additionally, our development business (Trammell Crow Company) is the largest in the U.S.; we operate one of the largest investment management businesses (CBRE Investment Management) globally, and our subsidiary Industrious is a leading provider of premium flexible workplace solutions. In addition, our majority owned subsidiary, Turner & Townsend Holdings Limited, is a global professional services company specializing in program management, project management, and cost consulting across the commercial real estate, infrastructure and natural resources sectors.

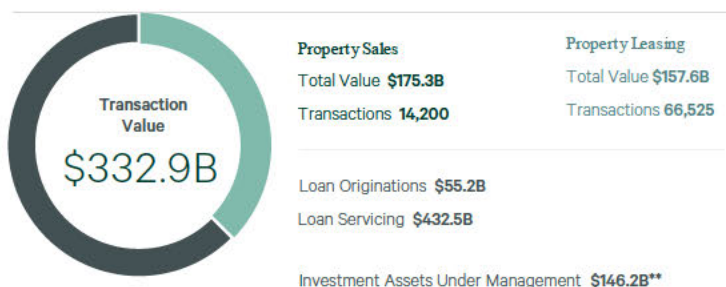
- CBRE, Inc. ("CBRE")  
2100 McKinney Ave, Suite 1250  
Dallas, TX 75201  
Tel: 1+ 214 979 6100  
  
**Local Office:**  
600 Grand Boulevard  
Miramar Beach, FL 32550  
Tel: 1+ 850 527 3524  
  
**Additional Location:**  
1 Independent Dr, Suite 3000  
Jacksonville, FL 32202  
Tel: 1+ 904 634 1200

- Established 1906 in San Francisco
- CBRE, Inc. is a Corporation  
(#0777218 - Delaware Sec. of State)
- Correspondence shall be addressed to:  
**Lee Ann Korst | CBRE**  
600 Grand Boulevard  
Miramar Beach, FL 32550  
leeann.korst@cbre.com
- Services provided by CBRE:  
Our services include leasing on behalf of tenants and landlords, property sales, acquisitions, valuation/appraisals, development and transaction advisory, as well as property management, facilities management, project management, and consulting services related to commercial property.

### Our Business Segments

Advisory Services	Building Operations & Experience	Project Management	Real Estate Investments
<ul style="list-style-type: none"><li>Advisory &amp; Transaction Services</li><li>Capital Markets</li><li>Valuations</li></ul>	<ul style="list-style-type: none"><li>GWS   Enterprise</li><li>GWS   Local</li><li>Industrious</li><li>Property Management</li></ul>	<ul style="list-style-type: none"><li>Turner &amp; Townsend</li></ul>	<ul style="list-style-type: none"><li>Investment Management</li><li>Development Services (Trammell Crow Company)</li></ul>
2024 Revenue \$7.73B Net Revenue \$7.67B Seg Op Profit \$1.50B	2024 Revenue \$20.21B Net Revenue \$9.04B Seg Op Profit \$0.89B	2024 Revenue \$6.81B Net Revenue \$3.14B Seg Op Profit \$0.50B	2024 Revenue \$1.04B Net Revenue \$1.04B Seg Op Profit \$0.26B

### 2024 Business Statistics



\* Including Turner & Townsend employees  
\*\*As of December 31, 2024

## Projects performed for agencies in the State of Florida during the last 3 years

## Portfolio Strategy, Consulting and Brokerage Services

## OVERVIEW



## SOLUTIONS

CBRE's successful projects for the [REDACTED] include:



## SAMPLE RESULTS

In identified savings opportunities through portfolio optimization

Reduction in leased square footage

## Lease transactions negotiated

Of CBRE lease transactions rated A or A+ by State Agencies in last 3 years

Surplus  
properties sold

Revenue generated  
for the State

Over minimum bid on average

Consulting credit  
hours generated from  
commissions

Estimated annual  
property tax  
returned to Florida  
municipalities

Please see Tab E, Additional Information, page E5, for additional projects performed for agencies in Florida in the past 3 years

### 3. Organizational Qualifications and Experience

Describe the firm's qualifications for performing similar, relevant, or related services. Identify the team's experience pertaining to the following:

- a. Technical capabilities in terms of personnel, equipment and materials, method of assigning work, and procedures for maintaining level of service.
- b. Developing, evaluating, performing real estate professional services and property management.
- c. Developing innovative approaches and problem solving.
- d. Specific knowledge of Florida's requirements that may relate to the scope of services.
- e. Completing projects within established schedules and budgets.

## Our Qualifications—a Proven Record of Success

CBRE is a full service real estate firm with the ability to provide brokerage and consulting services in each listed sector in the City of Crestview's Request for Proposal. CBRE is the world's largest commercial real estate services and investment firm, with 2024 revenues of \$35.8 billion. We have been included on the Fortune 500 since 2008, currently ranked #138.

In 2024 CBRE was recognized as the top ranked firm in U.S. commercial real estate sales activity for the 18th

consecutive year and is ranked #1 in brokerage categories of Office, Industrial, Retail, Multifamily and Hotels as noted by MSCI Real Estate (formerly Real Capital Analytics), an independent research and analysis firm.

CBRE has more than 130,000 employees in approximately 500 offices worldwide. We serve real estate investor and occupier clients in more than 100 countries and are proud to be recognized for our leadership, including the following awards and accolades:

- A **FORTUNE's** Most Admired Real Estate Company 14 years in a row
- **FORTUNE** Named one of America's Most Innovative Companies in 2024
- **Ethisphere** World's Most Ethical Companies eleven years in a row
- **Lipsey** #1 brand for 23 consecutive years
- **Forbes** Named one of the best large employers in America for the 4th consecutive year
- **Bloomberg** Named to Gender-Equality Index four years in a row
- **Financial Times** Diversity Leaders list 3 years in a row
- **BARRON'S** #3 most sustainable U.S. company
- **Forbes** A top company for both women and diversity 2024
- **Forbes 2024 Net Zero Leaders**; highest-ranked commercial real estate services company 2 years in a row
- **Newsweek** 2024 America's Most Responsible Companies list
- **3BL Media 2024 Best Corporate Citizens list**; 6th consecutive year on list
- **Kiplinger ESG 20** A top 20 company for meeting ESG challenges

- a. Technical capabilities in terms of personnel, equipment and materials, method of assigning work, and procedures for maintaining level of service.

Through its account management philosophy, CBRE combines the strategic, operational and financial acumen of dedicated professionals with the superior local market knowledge and tactical expertise of field professionals. The main goal of our account management philosophy is to maintain an account structure and culture that foster the right balance of execution excellence, systematic process and cost savings.

We help clients leverage and integrate CBRE's resources to build and achieve real estate goals by working in unison with clients to form execution strategy, manage resources, evaluate account performance and incorporate best practices. The proposed team for this opportunity forms the foundation for unsurpassed quality and consistency in execution. The CBRE Team will be responsible for all client-reporting functions, including monthly and yearly status reports, financial summaries and client satisfaction surveys. All transaction reporting will be integrated in to the current reporting structure of the client account.

The goal of this model is to provide a single point of connection between the City of Crestview and the CBRE Team to ensure the highest level of communication, create direct responsibility for service delivery and drive consistent processes. Our team consists of subject matter experts and will be engaged and aligned with all stakeholders.



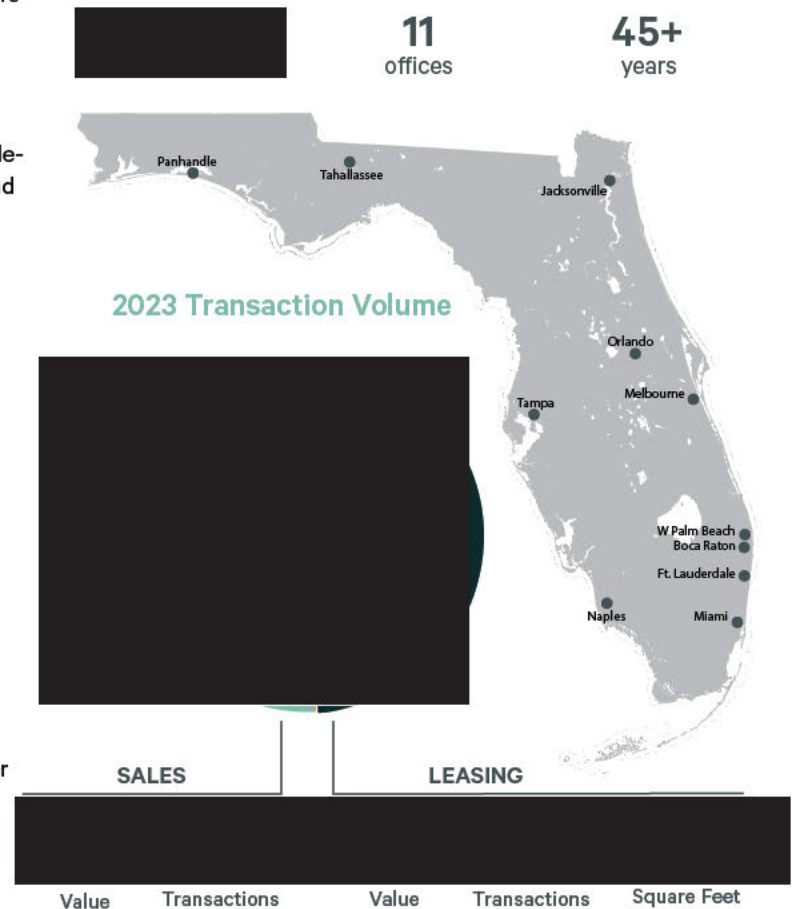
b. Developing, evaluating, performing real estate professional services and property management.

CBRE serves as advisors to tenants, developing real estate strategies aligned with their business, negotiating on their behalf, and leveraging our partners to add value. Our investor leasing experts create tailored marketing and leasing strategies to enhance value across all commercial real estate asset classes. Additionally, we manage acquisition or disposition of properties based on market trends and coordinate sale-leaseback transactions to reduce occupancy costs and free up capital.

Our key differentiators include our knowledgeable team of transaction professionals and subject matter experts, holistic strategies to meet business and financial goals, and advanced technology and data analytics for portfolio visualization and savings identification. We also provide detailed site selection analyses and workplace strategies for a productive employee experience.

CBRE Property Management focuses on one goal: shaping the property experience of tomorrow so our clients can realize the greatest potential from their real estate assets. We offer the City of Crestview the power of curated industry data, strategy built on human insights and the global solutions of CBRE. We're equipped, energized and eager to put our power to work in creating value for the City's properties. We come to every engagement with the power of deep industry knowledge, a strong advisory approach and the full resources of CBRE.

Florida's #1 Commercial Real Estate Services Firm  
Statewide Coverage & Leadership



c. Developing innovative approaches and problem solving.

CBRE's culture – grounded in service excellence and pushing real estate boundaries beyond traditional models and solutions – compels our team to relentlessly adapt, innovate, and evolve. Each year, CBRE invests heavily in new tools, technologies, and processes that deliver superior, cost-effective outcomes for our clients, driving disruptive change and differentiated outcomes across their global portfolios.

Our firm leads the industry in outcome-focused innovation and will provide the City of Crestview with best practices, advice, and data-supported insights, from workplace solutions, to new technologies, to new equipment that can improve delivery and drive efficiencies. CBRE's strong financial position is a key differentiator, allowing us to invest in our business in ways that directly benefit our clients. In the last five years, CBRE doubled our overall annual spend on technology and tripled our spending on the enabling side of the business to better equip and enable our professionals to be more effective and efficient for our clients. We invest approximately [Redacted] annually in digital capabilities investments, ensuring that we continue to drive technological innovation in our industry. By increasing our investment in cutting-edge technology, CBRE is perpetually prepared to discover, integrate, and share the next biggest innovations in the industry.

As a testament to the firm's innovative culture, CBRE is a four-time winner of the CoreNet Global Innovator Award for our tools and capabilities. CBRE was also named as one of America's Most Innovative Companies in 2024 by FORTUNE and received a Realcomm Digie Award for Best AI Innovation in Commercial Real Estate in 2024.

We empower our people to innovate by investing in platforms, organizations, and technologies that foster curiosity and reward ingenuity.

## Public Sector Experts who Understand Your Perspective

CBRE's Public Institutions & Education Solutions (PIES) Practice is a national group of expert professionals that solves complex real estate needs and business requirements for state and local governments and their agencies, including K-12 school districts, universities, and community colleges. We pair an expert understanding of public procurement requirements with best practices and local knowledge to execute transactions and projects tailored to meet your organization's mission and long-term strategy goals. We work across a range of property types including industrial, office, affordable housing, retail, and special use properties including golf courses, marinas, courthouses, civic centers, former prison sites, and more, developing and implementing cutting-edge real estate strategies for states, counties, cities, school districts, and other government entities, as well as public or private higher-education institutions.

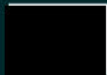
[REDACTED]

[REDACTED]

[REDACTED]



Cities &  
Counties



Team  
Members



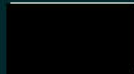
Rating from State  
Agencies



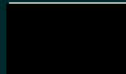
In Revenue Generated for Public  
Sector Clients Through Sales &  
Ground Leases



States



MSF



Combined Years of  
Experience



Public-Private Partnerships  
(P3s) Structured & Brokered

If CBRE is awarded a project by the City of Crestview, a detailed project implementation plan will be completed prior to the project kick-off date, which includes a detailed schedule of activities as well as milestones and critical path activities for any acquisition. Regular monitoring of technical quality, cost and performance of the internal and sub-consultant partners work and reports. Project leadership will meet on a regular basis to ensure that the work performed is consistent with the overall contract expectations and with the CBRE Team's expectations for quality client service. These meetings will serve as a basis for directing the effort for productivity, cost control and early identification and resolution of problems. CBRE will provide continuity, conduct objective oversight of staff performance, and maintain quality control for all scope of services.



#### 4. Key Individuals and Qualifications

Identify and include qualifications of specific individuals to be assigned to the project including the individual(s) who would be assigned overall responsibility for performing the services.

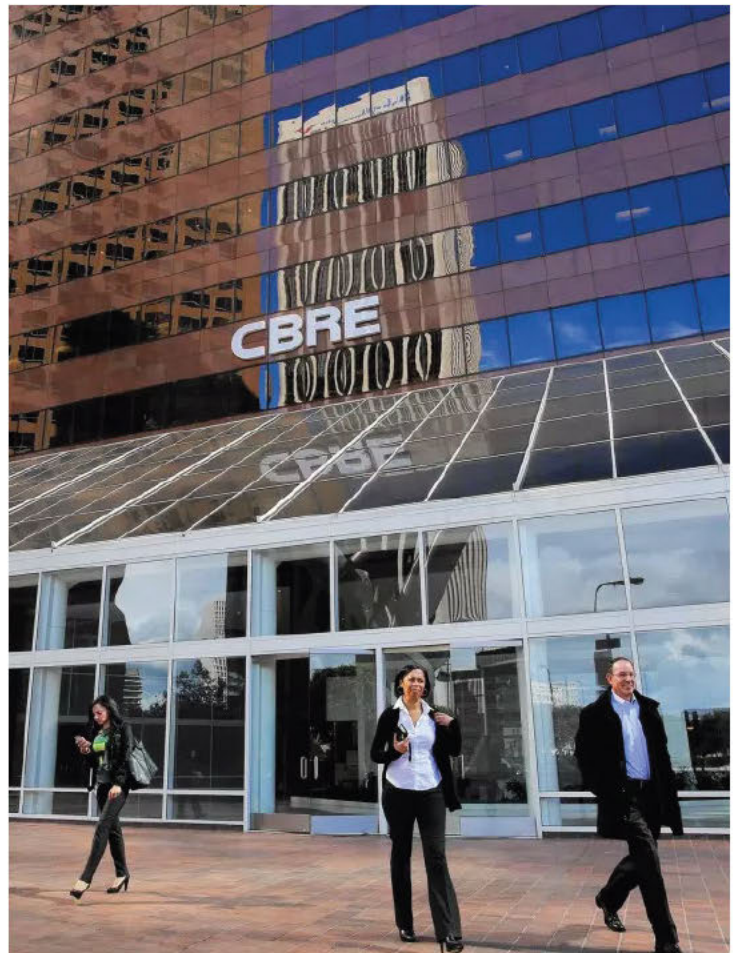
- a. Include project team resumes. Indicate the Project Team by name and title and specify which services the individuals will provide to the City. Resumes should focus on projects or work performed that is similar in scope to this type of work.
- b. Provide a project team organizational chart indicating the primary role and responsibility of each team member.
- c. The proposal should clearly associate specific staff with tasks, estimate the percentage of time they will be available to the project and their qualifications.
- d. Submit short experience statements for each identified individual, including prime personnel, and their key qualification and experience which makes them suited for their proposed assignment on the project. Full resumes can be included as an appendix to the proposal. Every effort should be made to ensure that staff resources identified in the proposal would be available for the project in the event an agreement is awarded to your firm.

CBRE has assembled a talented, collaborative, proactive service delivery team that will partner with the City of Crestview to provide a better informed understanding of drivers and factors impacting the real estate choices you make. We will be focused on outcomes and results that matter to you by providing local representatives that understand the nuances of the market along with state-wide resources, public sector experts, and a global platform of information, technological tools and best practices of the global industry leader.

[REDACTED]

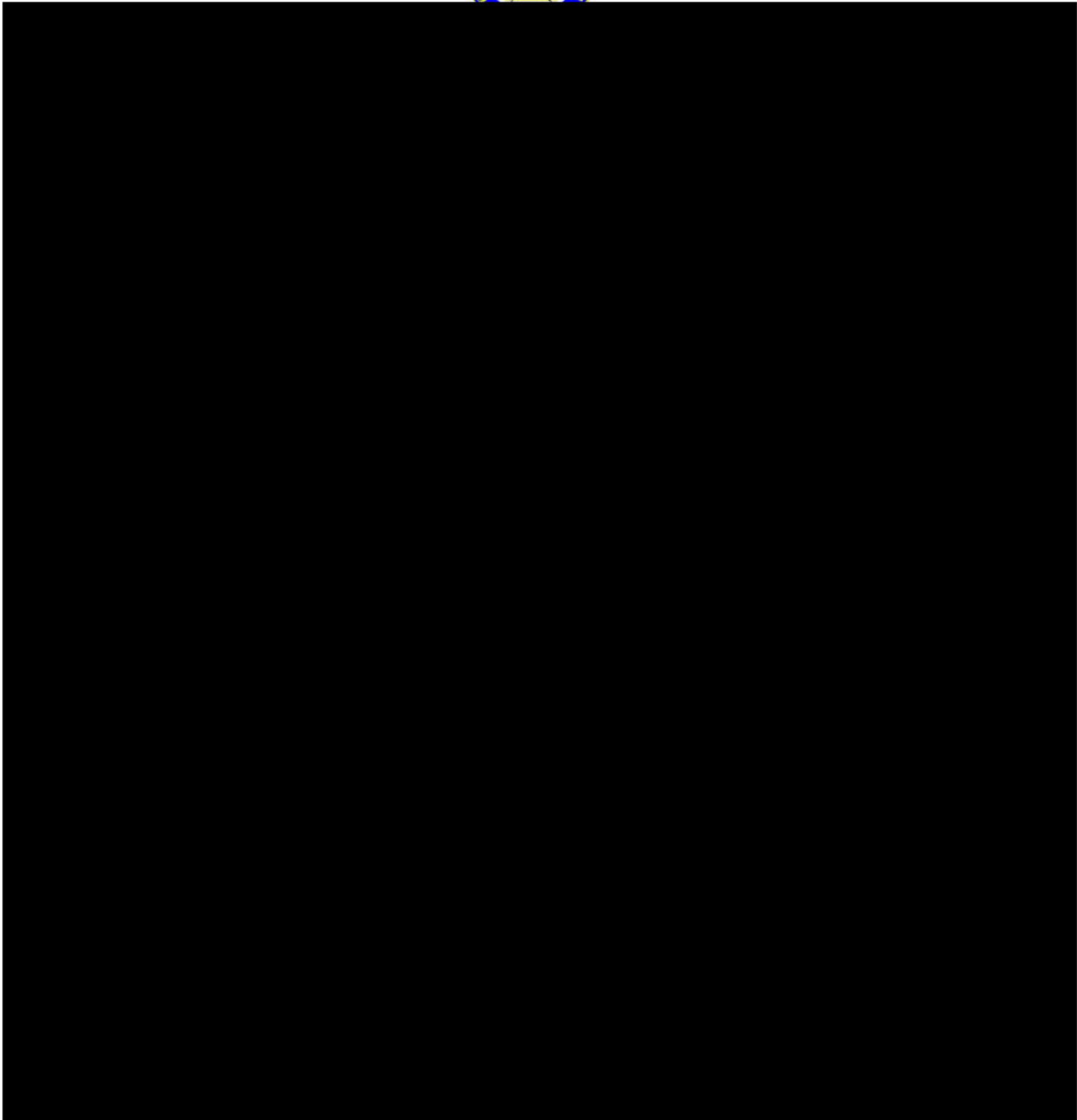
[REDACTED]

[REDACTED]



# Project Team Org Chart

Combining local, regional, and national experts in all facets of commercial real estate and property management, the CBRE team provides a one-stop shop for world-class advice and analysis.



*Key team member resumes are included in the Appendix.*

## Key Team Member Roles & Responsibilities

[illegible]



## Key Team Member Roles & Responsibilities Cont'd

Group	U.S. should take more action to address climate change	
All respondents	Yes	71%
	No	27%
Democrats	Yes	87%
	No	11%
Republicans	Yes	50%
	No	48%

## Support Team Roles & Responsibilities

Category	Value	Value
Category 1	100	100
Category 2	100	100
Category 3	100	100
Category 4	100	100
Category 5	100	100
Category 6	100	100
Category 7	100	100
Category 8	100	100

## 5. Litigation

Provide a summary of any litigation, claim(s), or contract dispute(s) which have been finalized and/or decided by a court of law, which were filed by or against the firm in the past five (5) years. The summary should state the nature of the project, litigation, claim, or contract dispute, a brief description of the case, the outcome, and the monetary amounts involved. The disclosure can be limited to:

- a. Cases, which are related to contractual services provided in the regular course of business.
- b. The regional/district office that will be supporting this contract.
- c. Sanctions: List any regulatory or license agency sanctions.
- d. Lost Accounts: Provide a complete list of all accounts lost due to early dissolution or non-renewal. Include contact names and telephone number, length of service at each account, and reason for the loss. This list can be limited to the regional/district office, which will be supporting this contract, and may be limited to the past five (5) years.
- e. Canceled Accounts: Provide a complete list of all accounts canceled/terminated by the Proposer prior to the expiration date. Include contact name and telephone number, length of service provided, and reason the firm chose to cancel the contract. This list can be limited to the regional/district office that will be supporting this contract and may be limited to the past five (5) years.
- f. Contract Denial: Indicate if your firm has been denied a contract award on which you submitted the best proposal. If so, explain in detail.

As a global firm with more than 130,000 employees, from time to time CBRE is involved in litigation incidental to its business. As a public company, any material litigation is disclosed in our SEC filings. In the company's opinion, no litigation to which CBRE is currently a party, if decided adverse to the company, is likely to have a materially adverse effect on CBRE's ability to perform for the City of Crestview.

**Sanctions:** There are no sanctions against CBRE or member of the CBRE Team assigned to the City of Crestview by any regulatory or licensing agency

**Lost Accounts:** From time to time clients will opt not to renew, based on market conditions or strategic changes in direction. We do not track these events in a centralized way but are proud to have earned a renewal rate over [REDACTED] for large corporate integrated accounts.

**Canceled Accounts:** We have never had a public sector contract terminated for cause.

**Contract Denial:** N/A

## 6. Financial Plan

**Demonstrate your firm's financial soundness and history of meeting financial obligations.**

1. Financial Stability. Each respondent is required to submit documentation to demonstrate that their business is fiscally and operationally sound, with sufficient human and financial resources necessary to: (1) fulfill the implicit and explicit contractual obligations identified in this solicitation and (2) provide the level of services required by the specifications that result from the solicitation process. The following documentation is required to be submitted with your response to this solicitation, or your response will be disqualified.

Respondents are required to submit the following checked items (if both 1 and 2 are checked then Respondent may submit either 1 or 2):

☒ 3. No Financial Documentation Required.

B. Pending Litigation Disclosure. Each respondent is required to provide disclosure of any current or pending litigation on the Respondent's letterhead. Respondent shall disclose any material changes in the business operations of the Respondent, including without limitation any pending bankruptcy proceedings, bankruptcies, receiverships, mergers, acquisitions, stock acquisitions or spin-offs which have occurred within the last three (3) years and any material pending or threatened litigation. If appropriate, discuss the impact of these changes on the Respondent's financial or managerial ability to perform the noted tasks under this Contract.

There are no material changes in the business operations of CBRE, including without limitation any pending bankruptcy proceedings, bankruptcies, receiverships, mergers, acquisitions, stock acquisitions or spin-offs which have occurred within the last three (3) years and any material pending or threatened litigation that will impact CBRE's financial or managerial ability to perform the noted tasks under this Contract.

### FINANCIAL STRENGTH & EXECUTION CAPABILITY

CBRE's strong financial stability is paramount to our ability to invest in platform resources, technology, training, and leadership to support the City of Crestview throughout our partnership. Macroeconomic fundamentals remains supportive of solid growth for our business in 2025 Moody's: Baa1 Stable Outlook.

CBRE Financial & Debt Ratings

Standard & Poor's (S&P): BBB+ Stable Outlook.

Dun & Bradstreet Rating: 5A2

DUNS #: 61-760-8104

Latest Debt Ratings can be found on [CBRE's Investor Relations page](#)

CBRE Group, Inc. (NYSE:CBRE) has reported financial results for the fourth quarter and year ended December 31, 2024.

#### Key Highlights:

- Q4 GAAP EPS of \$1.58; Core EPS of \$2.32 and 2024 GAAP EPS of \$3.14; Core EPS of \$5.10
- Revenue up 16% for Q4 and 12% for 2024; net revenue up 18% for Q4 and 14% for 2024
- Resilient Business (1) net revenue increased 16% for Q4 and 14% for 2024
- \$1.7 billion net cash flow from operations and \$1.5 billion free cash flow for all of 2024
- Repurchased more than \$800 million worth of shares since the end of third-quarter 2024
- Expect to achieve 2025 Core EPS of \$5.80 to \$6.10 - reflecting mid-teens growth at the midpoint



# B

CBRE



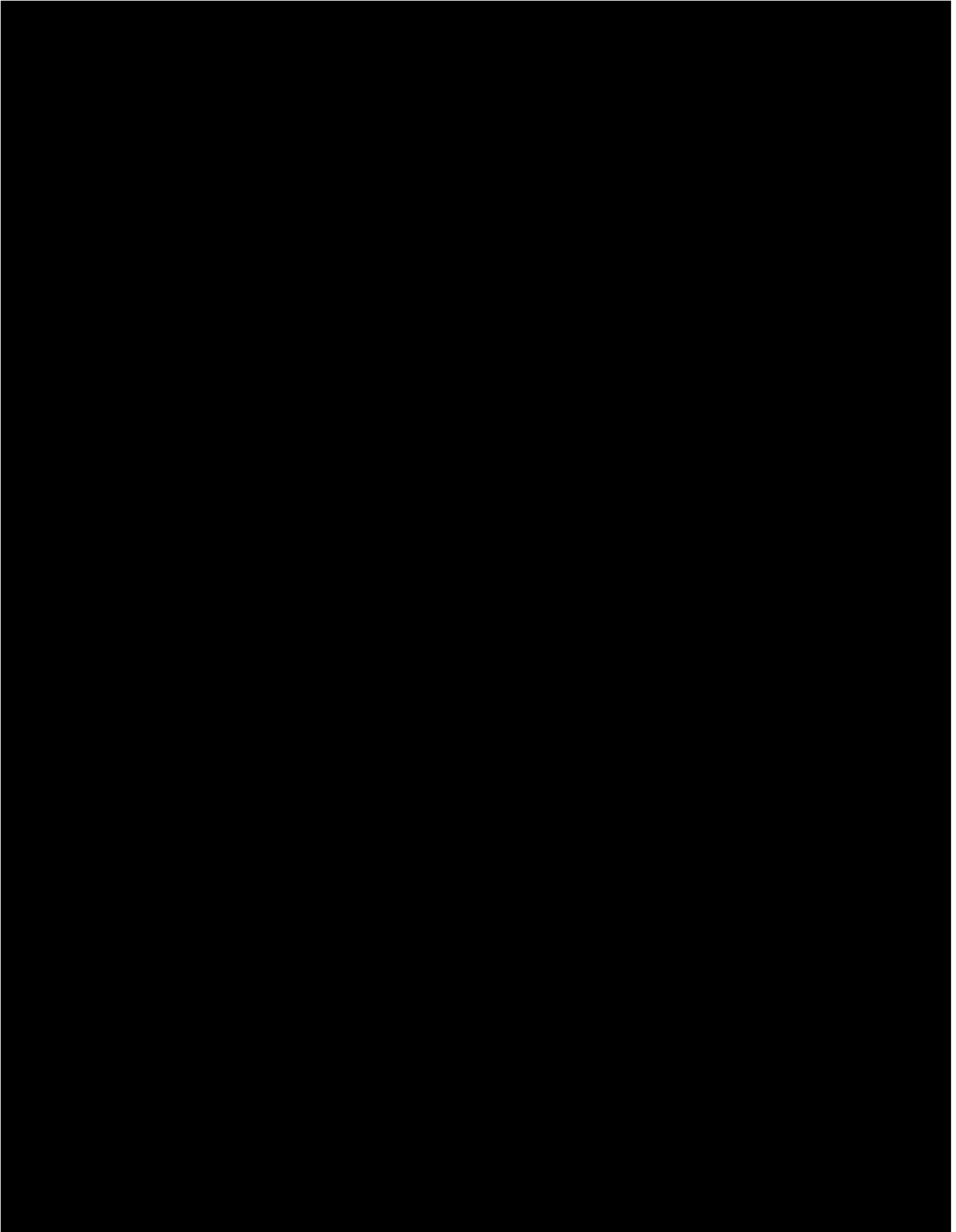
## Similar Projects, Past Performance

- a. Client References. Provide a list of three former clients and representative services in size and scope undertaken in the last three (3) years, demonstrating experience relevant to this RFP.
- b. Provide each reference's contact person's name, title, address, phone number and email address.
- c. In addition, provide the dates of engagement of services, information, cost of services and total annual contract, description of services, and member(s) of the team including any sub-consultants that performed the services.
- d. Unless otherwise stated herein to submit references in a different manner, please complete and submit Reference Form (Attachment 9) with your proposal response.
- e. Describe any significant or unique awards received or accomplishments made in previous, similar projects.

## ATTACHMENT #9 - REFERENCES

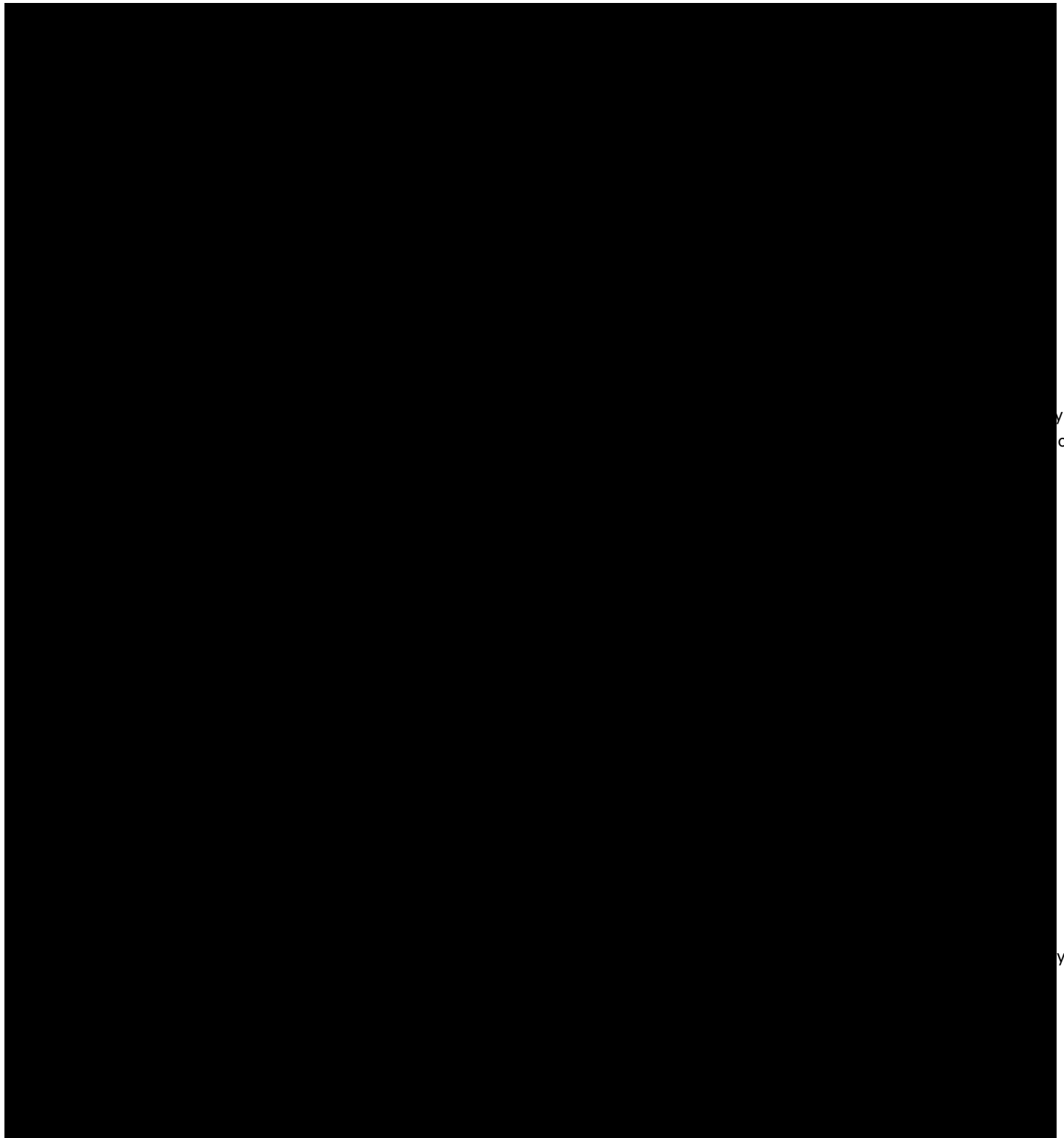
Reference 1:	
Reference 2:	
Reference 3:	

# Sample Dispositions for Public Sector Clients





# Sample Acquisitions for Public Sector Clients



y  
of

y

# Case Studies

## County, FL

Land disposition services

### CHALLENGE

CBRE was engaged by County, FL following a competitive procurement. The County was seeking expert commercial real estate advice and representation related specifically to two parcels it was seeking to sell. The parcels include ±138 acres of raw land, and the former centrally located in

### SOLUTION

CBRE provided an assessment of each property's strengths and weaknesses, and a customized marketing strategy that took into account in-demand use types in the region, a likely pool of buyers, and the individual property's characteristics. The team developed custom marketing materials for each property and launched a global campaign to generate interest and competition for the assets.



### RESULTS

The is currently under contract on the land parcel with closing anticipated for later in 2025. The price is highly competitive and the future buyer intends to develop residential housing on the site. We have continued to bring interested parties to the Courthouse property, most recently a FL agency with an occupier requirement.

## , FL

Development Advisory, P3 Structuring, Marketing, Negotiation

### CHALLENGE

The have embarked on an ambitious plan to establish a more robust downtown area to stimulate economic development, enhance the area's competitiveness, and create a sense of place and identity for the have strategically designed a land assemblage of over 121 parcels totaling ± 75 acres, invested in drainage and site infrastructure, and are working on modifications to the traffic patterns in the area to improve safety and pedestrian access. The sought CBRE's support in engaging appropriate development partners to deliver effective mixed uses on the properties, including a new City Hall facility, transit-oriented development, and retail and multifamily services.

### SOLUTION

CBRE has worked consultatively with the to capture citizen feedback and desires for growth in the area, preparing a comprehensive developer solicitation and incorporating the significant amount of pre-development work the has already completed. CBRE launched a global marketing campaign encompassing all 75 acres with highly customized marketing materials, including an Invitation to Negotiate, a property website, drone video, and media outreach.



### RESULTS

The offering received significant market interest, and CBRE was proud to deliver multiple competitive offers for the consideration. CBRE has been the full partner in the proposal evaluation and review process, providing detailed financial, construction, and feasibility analyses to support the evaluation team. In October 2023, CBRE presented a side-by-side comparison of the developer proposals and was proud to achieve a 5-1 approval vote from Commission to move forward with negotiations with the highest ranked offeror. The final project has a value of \$1.9B and will entirely remake the downtown.

[Click here to view a video of the proposed redevelopment](#)



# Case Studies

**[REDACTED], FL**  
Development Advisory Services

## CHALLENGE

The [REDACTED] had received an unsolicited offer for downtown redevelopment and a new city hall and was seeking professional services to advise on the viability of the proposals and or represent the [REDACTED] in the solicitation of additional competitive proposals. The desired outcome is the selection of a development partner with the proven experience and financial capacity to transform the ±30-acre site into a curated, mixed-use destination, supporting uses such as civic, recreation, mixed-income housing, restaurants, retail, office, and hospitality. This ambitious project represents a unique opportunity to reshape a key area of the [REDACTED] and create a dynamic hub for residents and visitors of [REDACTED]

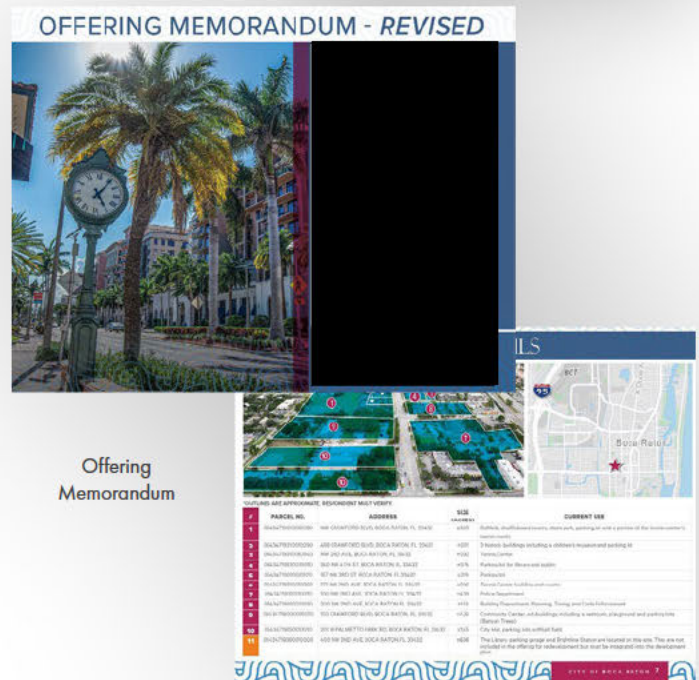
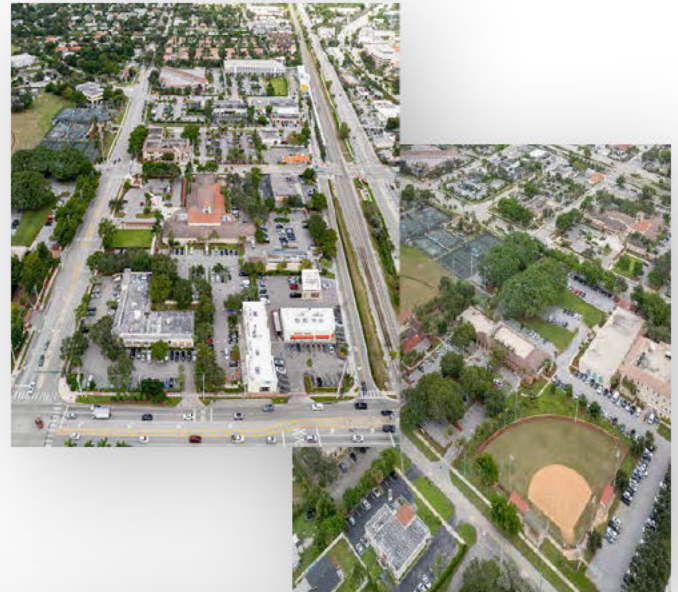
## SOLUTION

As a key step in this process, CBRE prepared and released an Offering Memorandum, which outlined the development opportunity and formally invited developers to submit their proposals for consideration.

The [REDACTED] partnered with CBRE to guide the process of identifying and selecting a qualified developer for the project. This partnership includes CBRE representing the [REDACTED] in all project negotiations, with our fiduciary responsibilities existing solely to and on behalf of the [REDACTED]

## RESULTS

Four development teams submitted proposals to the [REDACTED] outlining their plans for site construction and revenue generation. [REDACTED] represented CBRE in a [REDACTED] Council Workshop on January 27th, where each team presented their proposal and the [REDACTED] priorities were reviewed. With CBRE's support, elected officials will rank the proposals and move to an interim agreement in the first half of the year.





# Case Studies

## Jacksonville, FL

### Purchase of Build to Suit Headquarters

#### CHALLENGE

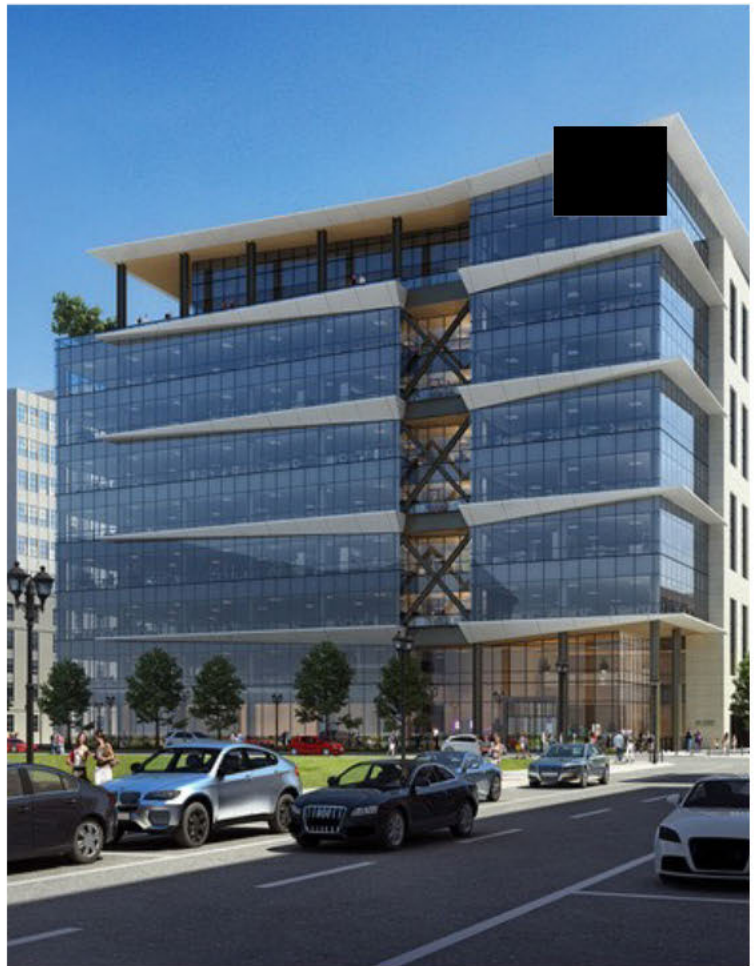
The [REDACTED] struggled with deferred maintenance and modernization at its existing headquarters. An external study determined that [REDACTED] would need to spend \$98 million on capital expenditures to maintain the campus over the next 20 years and has spent over \$8 million on repairs alone in the last ten years. The building did not meet [REDACTED] operational needs and represented a risk to [REDACTED] continuity of operations.

#### SOLUTION

CBRE was engaged to advise and represent [REDACTED] in the planning and executing of a new headquarters building acquisition. CBRE's global marketing process enabled [REDACTED] to receive six proposals, narrowed to three in the shortlist process. Nationally recognized developers participated in proposing a range of options ranging from integration with existing NFL-centered development, an existing City-owned site, and a developer-owned site adjacent to a hotel. The proposals represent an opportunity for the new headquarters to help [REDACTED] realize its mission of providing the best service by becoming the center of its customers' energy and water experience.

#### RESULTS

On April 3, 2019, [REDACTED] announced its selection of Ryan Companies as its preferred developer, citing extremely high-quality proposals and developer responsiveness. Ryan proposed building the new headquarters on a City-owned parcel on Adams Street, which is purchased from the City, and then leasing the new headquarters to [REDACTED]. The proposed development would combine the customer service center and the corporate offices into a 207,810-square-foot tower, with an attached 850-space parking garage. The total rentable square footage comprises 195,426 square feet, and the project would cost \$72 M. The Board unanimously approved the award, and Ryan began its preparations. In May of 2020, the Interim CEO requested that Ryan consider a smaller building: six floors and 152,000 square feet, to reduce [REDACTED] costs and account for a separate initiative to move 220 employees to a "hardened," weather-proof 40,000 SF facility. The CBRE team evaluated the cost impact to [REDACTED] and determined that the updated design will reduce construction costs by \$10 million to \$14 million. Further, a reduced footprint would save [REDACTED] \$19 million to \$35 million in operational costs from its existing 360,000-square-foot, 19-story tower, and campus. The Board approved this approach, and construction began in 2020. CBRE was engaged to provide owner's representation services and managed the successful delivery of the building in early 2023.





# C

CBRE



# Project Approach/ Work Plan

- a. Work Plan/Technical Approach/Project Management. Outline your project management approach including how you will address competing timelines and inter-project dependencies. Submit a work plan for each task for carrying out the scope of services described in this RFP, including strategy, tools, techniques, critical path items, and decision points which reflect an understanding of the City's requirements. Assumptions, desired outcomes, and deliverables must be included as part of your firm's approach to each major task area.
- b. Schedule: Describe the task and overall project schedule; highlighting any critical path items and essential input or staff requirements. Provide a project implementation schedule for proposed services including any management and planning strategies.
- c. Confirm the adequacy of resources, including personnel, availability of personnel, labor, equipment and supply resources, and other requirements to provide the requested services.
- d. Provide a clear statement of the specific services and tasks to be performed. Include information concerning each task and staff committed to accomplish each task.
- e. Explain any proposed innovative concepts that may enhance the value and quality of the services to be performed.
- f. Validate the current and projected workload of Firm.

Responses to a. through f. have been combined and our approach broken down by service type—Disposition, Acquisition, Leasing (Landlord & Occupier Representation) and Property Management. These include capabilities and tasks, scheduling and timelines, resources, innovative tools and technology and staffing to carry out the services required by the City as set forth in the following Scope of Services. CBRE provides the combined resources of our market-leading brokerage professionals and the national perspective; the insights of our Public Institutions & Education Solutions team, uniquely focused on the real estate needs of states, counties, municipalities, and educational institutions; and the robust and scalable platform of our Property Management service line.

Services	Outlined on page(s):
Provide property management services of all leased real property assigned by the City.	38, 39
Obtain executed purchase agreements in accordance with the form and content as directed by the City.	31-33
Advise the City, and its staff in matters regarding the purchase, offers, claims, counteroffers, discussions, and issues pertaining to the purchase/sale/lease of the assigned property(ies).	31-33
Attend closings schedules on purchases/sales by the City, at the request of the City.	31, 33
Attend meetings and/or public hearings with City staff, their agents, City officials, property owners, and other parties involved in the project at either the request of the City or as part of the Contractor's work effort.	E2 (Additional Information)
Assist the City with efforts of obtaining plans, right-of-way maps, title searches, title commitments, owner's title policies, appraisals, acquisition and/or eminent domain use in a project.	28, 33
Provide other real property services requested by the City to plan, implement, negotiate, purchase, sell, lease and acquire the property assigned by the City.	27-39



# Approach to Dispositions

## Services & Tasks

In the event the City would like to sell property for any reason, CBRE offers the industry's broadest regional, national, and international platform for the analysis and marketing of disposition opportunities. We will develop a custom strategy for any project but only after carefully reviewing all previous work, investing time to understand stakeholder needs, considering changes in the overall commercial real estate market in the region, completing financial analysis tasks, and considering the impact of Board approvals and other unique public-sector elements.

### STAFF



**Tom Watson**  
Senior Vice President



**Elizabeth Forsythe**  
Vice President



**Sam Herrera**  
Associate



**Lee Ann Korst**  
Southeast Regional  
Manager | PIES

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

## Understand Market Position and Disposition Options

[REDACTED]

## Analyze the Property

[REDACTED]

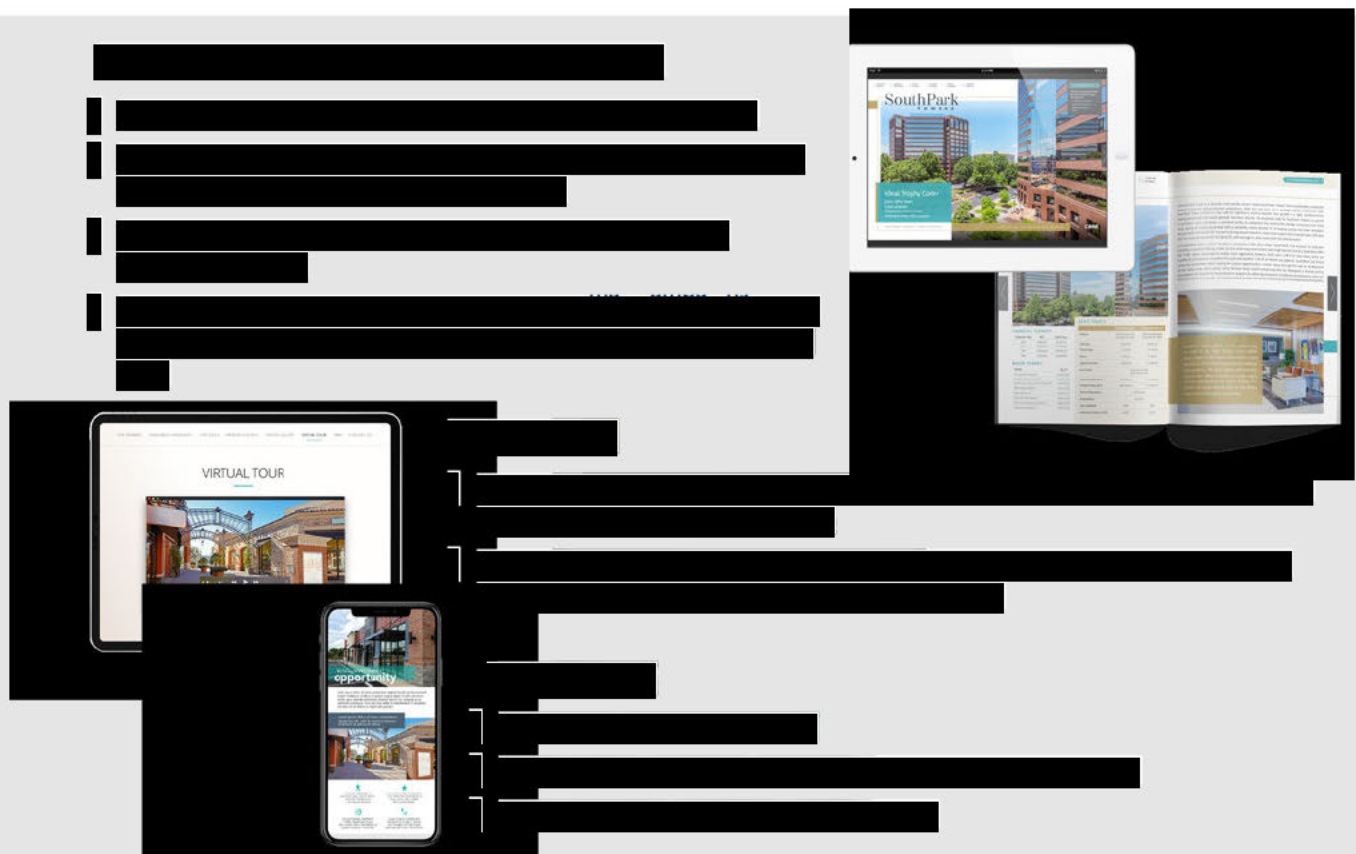
[REDACTED]

[REDACTED]

## Market the Property

When you partner with CBRE, you unlock the industry's leading marketing platform. Our team will deliver a tailored marketing strategy specific to your goals, develop a highly polished collection of materials and apply tactics and technologies that will communicate the unique value and opportunity at the property.

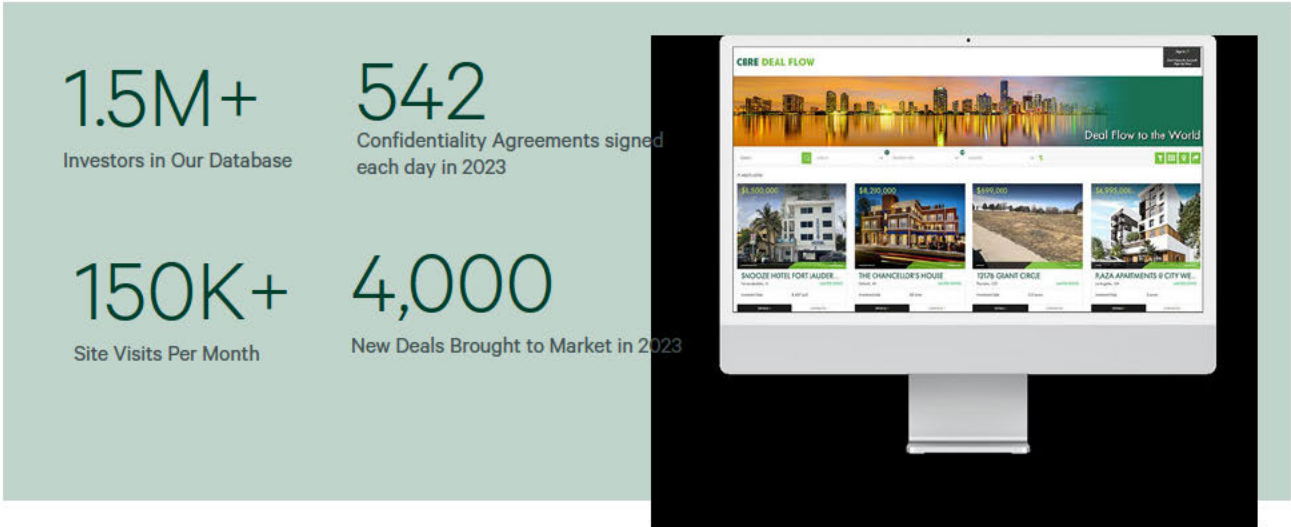
**Our integrated suite of virtual marketing solutions delivers maximum results.**



**CBRE Deal Flow**

CBRE Deal Flow connects investors to the largest, most diverse for-sale inventory, and we put this data to work to anticipate trends and drive our industry-leading sales volume. Deal Flow brings together a highly targeted audience of pre-qualified buyers and matches them with global inventory to accelerate performance and deal velocity.

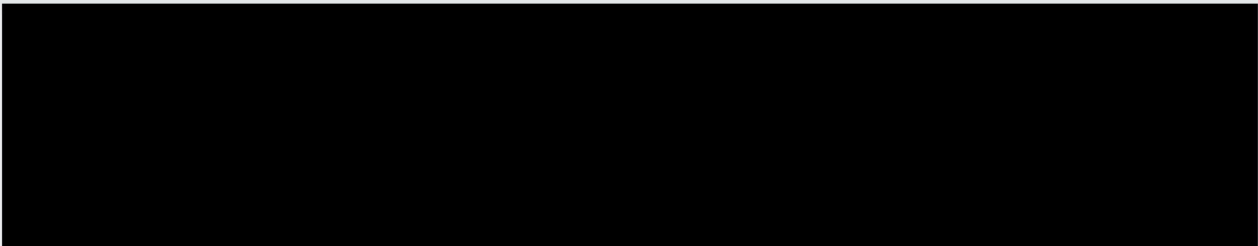
With Deal Flow we can securely store due diligence materials, track market interest, send emails to interested parties, and update documentation with the click of a button.



**Sample Marketing Campaigns for Similar Clients**



**Sample Videography for Similar Clients**





## Global Exposure, Local Relationships



CBRE migrates more global capital around the world and into the U.S. than any other firm.

### 2023 Highlights

#1

Globally in total properties sold  
& total dollar volume for the 11th  
consecutive year

23.7%

Global market share

\$64.8B

Global cross-border  
investment sales activity

52.2%

More than our closest  
competitor

\$177.0B

Global cross-border  
investment sales activity  
since 2019



## Proposal Evaluation, Selection, Negotiation & Closing

[REDACTED]

[REDACTED]

[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]
[REDACTED]	[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



# Approach to Acquisitions

[REDACTED]

[REDACTED]

## STAFF



**Tom Watson**  
Senior Vice President



**Elizabeth Forsythe**  
Vice President



**Sam Herrera**  
Associate



**Lee Ann Korst**  
Southeast Regional  
Manager | PIES

## Services & Tasks

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]
- [REDACTED]

## Identify & Qualify Properties

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]

[REDACTED]



We harness the power of maps and demographics to visually understand a location and its impact on your strategy



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egy.

tc.)

### Negotiate the real estate transaction to minimize the City of Crestview's overall cost

\_\_\_\_\_

\_\_\_\_\_

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\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

# Approach to Leasing

## City of Crestview as Landlord



### STAFF



**Tom Watson**  
Senior Vice President



**Elizabeth Forsythe**  
Vice President

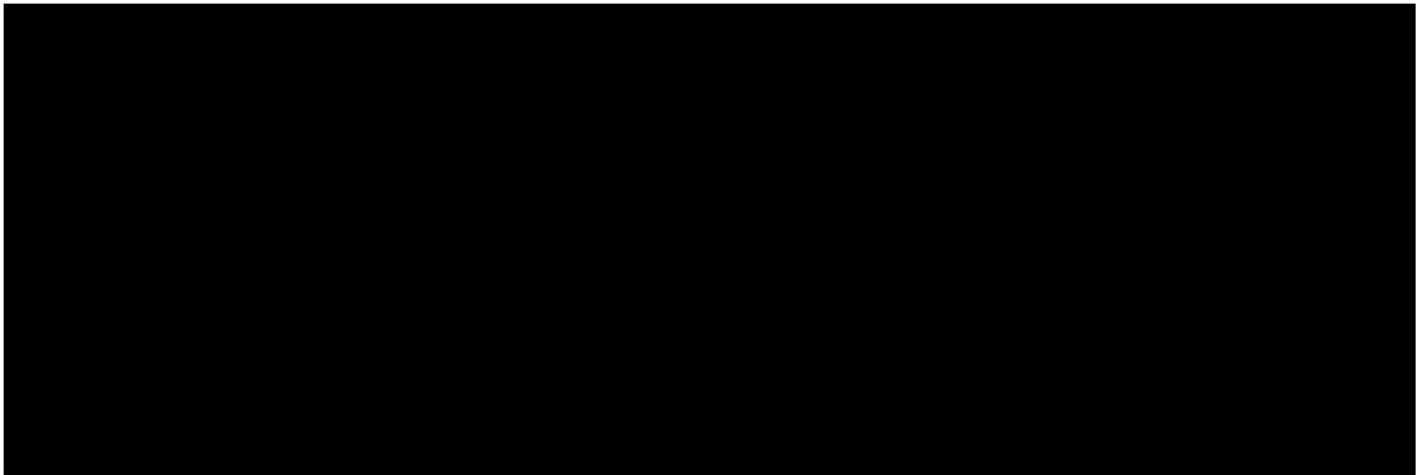


**Sam Herrera**  
Associate



**Lee Ann Korst**  
Southeast Regional  
Manager | PIES

## Services & Tasks



## CBRE ADVANTAGES FOR THE CITY OF CRESTVIEW

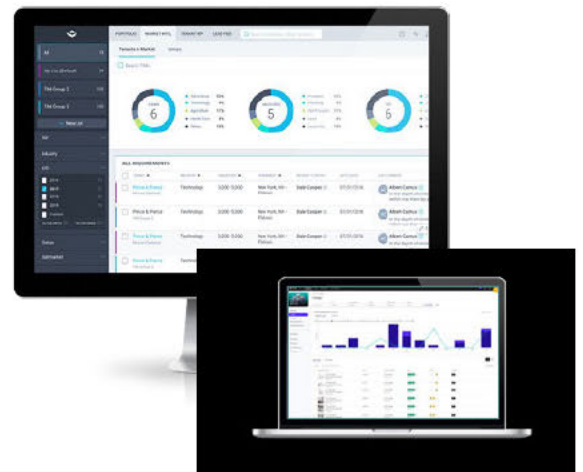
- Proven methodology for attracting tenants and rapid lease-up
- Best in class technology and reporting tools to streamline coordination with your real estate staff
- Unique collaboration between markets and service lines to leverage relationships in Occupier Reps, Global Workplace Solutions, Project Management, and Location Intelligence

## RESULTS:

- Reduced lease costs due to less turnover
- Fully leased portfolio performing to projections
- Healthy tenant base with rent payments offsetting tenant improvement costs
- Confident, data-based decision-making due to market insight and technology tools

## Proven Methodology for Producing a Tenant

### Reporting Insight







### CBRE Financial Consulting and Scenario Analysis Platform

CBRE's Financial Consulting Group (FCG) provides sophisticated financial analysis and underwriting unparalleled in the real estate industry. FCG concisely and accurately presents viable options while taking into consideration the potential impact to earnings and/or the balance sheet, as well as other stated financial/operating benchmarks. Combined with the depth of experience and market knowledge of our brokerage professionals, CBRE's FCG empowers clients to make the optimal business decision.

CBRE's extensive capabilities include:

- Comparative Lease Analysis
- Early Renewal – "Blend & Extend" Modeling
- Lease Abstracts
- Expense Recovery Verification
- Historical Expense Analysis
- Own vs. Lease Analysis
- Market Supported Underwriting Assumptions
- Customized Excel Models
- Due Diligence
- Market Valuations



**Powerful financial analysis on your side of the table.**

**Included at no cost to the City of Crestview or landlord**

# Approach to Property Management

CBRE offers a full-service property management platform to support the City as needed. In addition we have partnered with NAI Pensacola to provide supplemental services and coverage based on the City's needs.

## Services & Tasks

### Accounting

Accurate and timely, ensures financial integrity and targets specific accounting and financial reporting needs.

### Asset Management

Brings together expertise from management, leasing, communications and finance to provide a single point of contact across all asset classes.

### Building Engineering & Technology Services\*

Comprehensive engineering services, safe environments and tenant satisfaction.

### Business Continuity

Ensures critical business functions supporting our clients continue to operate and function in the event of disruptions or emergencies (includes Hurricane Preparedness outlined in Tab E, Additional Information, page E9).

### Digital Solutions

Powered by the industry's best intelligence across all property types, we harness data and technology to enable exceptional client outcomes:

- **PULSE**—Comprehensive property management tool
- **Procure to Pay (P2P)**—Transparent electronic procurement platform
- **Host Core**—Nimble work order system
- **MRI & Yardi**—Fully integrated accounting and reporting solutions

### Energy & Sustainability

Greenest capabilities to set the standard for eco-friendly operations, further bolstering property performance and market perception.

### Human Resources (People)

Attracts, retains and onboards the industry's best talent to client properties.

### Lease Administration

Maximizes the earning potential of properties and portfolios.

### STAFF



**Marc Scaffe**  
Director | North Florida  
CBRE Property Management



**Cameron Cauley**  
President  
NAI Pensacola Property Management

### Procurement

The best possible service providers, real-dollar cost savings and streamlined property efficiencies. Transparent electronic procurement platform (P2P) to regulate the purchasing lifecycle and maximize vendor performance. Leverages CBRE's national purchasing power to secure best possible pricing.

### Project Management (PJM)

Reduces overall delivery costs, keeps projects on schedule and provides superior market knowledge for informed decision making. PJM oversees \$124 billion in managed capital projects and new construction and manages 52,000 projects annually. Also, supervises outside consultants for complex projects requiring a third-party consultant.

### Security

Lowers risk and ensures a secure environment at our managed properties for the benefit of our clients and tenants.

### Sustainability Services

Sets the standard for eco-friendly cost-effective operations. Reduces energy consumption with low- or no-cost techniques. Meets benchmarking for ENERGY STAR® and certification standards for LEED (Leadership in Energy and Environmental Design).

### Tenant Relations

Boosts overall property image, promotes renewals and achieves asset management objective. Scalable, hospitality-based programs. All-inclusive services focused on the needs of tenants, their employees and visitors.

### Transition Services

Swift, seamless transfer of property operations to CBRE, with zero interruption to tenants or stakeholders.

\*CBRE Building Engineering & Technology Services does not maintain a professional engineering license. This is a service offering under CBRE, Inc. and does not include engineering services for which a professional engineering license from a state registration board is required.



## STRATEGIC PARTNERSHIP

CBRE regularly partners with NAI |Pensacola's Property Management division on properties we manage in the Panhandle area, and may engage them as a subcontractor to perform property management based on the City's needs.

### NAI Pensacola Services

#### Maintenance of Physical Asset

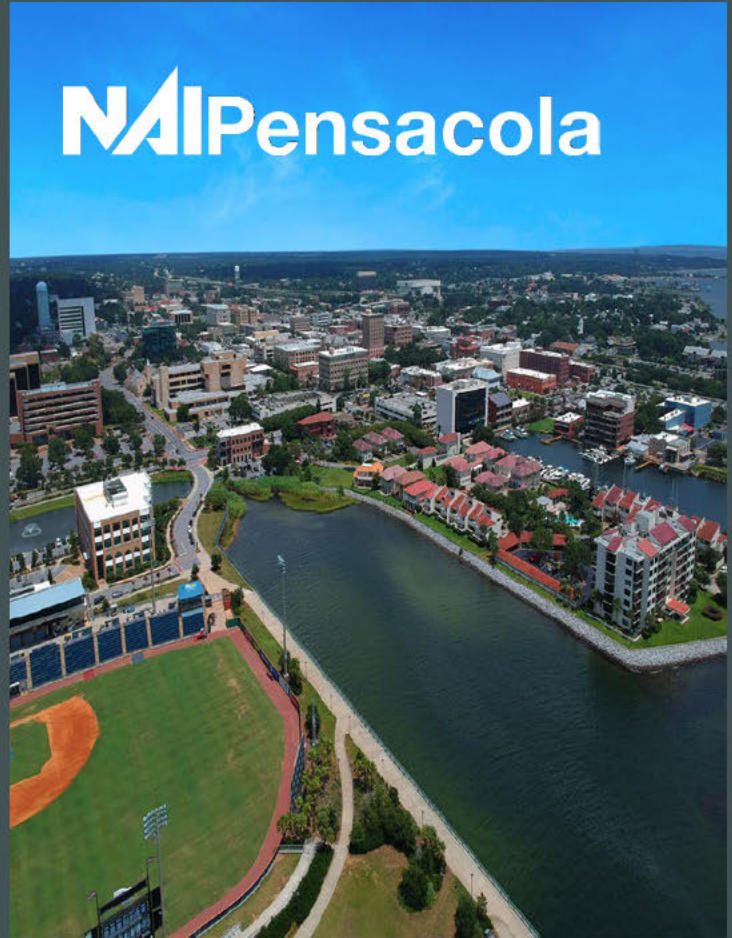
- Establish preventative & reoccurring maintenance program
- Log all building equipment data to trigger automated alert when maintenance needs to occur
- Perform property visits with detailed inspection report, photos & recommendations
- Conduct property evaluation program checklist
- Measure energy consumption through Energy Star programs

#### Vendor Management & Service Contracts

- Recommend vetted list of preferred vendors
- Regularly bid and evaluate contracts
- Leverage economies of scale to mass bid services
- Assemble COI database to track expiration and compliance
- Utilize risk management & vendor compliance forms
- Routinely evaluate building system warranties

#### Accounting, Reporting, & Financial Benchmarking

- Produce annual property budgets
- Compile 5-year capital expenditure plan
- Provide monthly variance reports comparing actual expenses to budget
- Benchmark operational expenses to industry standards
- Oversee financial management with thorough multi-level review
- Process & enforce rent collections



# D

CBRE



## RFP Required Forms



# Insurance Certificate



## CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY)  
10/30/2024

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

**IMPORTANT:** If the certificate holder is an **ADDITIONAL INSURED**, the policy(ies) must have **ADDITIONAL INSURED** provisions or be endorsed. If **SUBROGATION IS WAIVED**, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

<b>PRODUCER</b> Aon Risk Services Northeast, Inc. Connecticut Office 800 Connecticut Ave Norwalk CT 06854 USA		<b>CONTACT NAME:</b> PHONE (A/C. No. Ext): (866) 283-7122 FAX (A/C. No.): 8003630105 <b>E-MAIL ADDRESS:</b>	
		<b>INSURER(S) AFFORDING COVERAGE</b>	<b>NAIC #</b>
<b>INSURED</b> CBRE Group, Inc. and Subsidiaries 2121 N. Pearl Street Suite 300 Dallas TX 75201 USA		<b>INSURER A:</b> American International Group UK Ltd <b>INSURER B:</b> <b>INSURER C:</b> <b>INSURER D:</b> <b>INSURER E:</b> <b>INSURER F:</b>	AA1120187

**COVERAGES** **CERTIFICATE NUMBER:** 570109191181 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. **Limits shown are as requested**

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
	<b>COMMERCIAL GENERAL LIABILITY</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> OCCUR  GEN'L AGGREGATE LIMIT APPLIES PER: <input type="checkbox"/> POLICY <input type="checkbox"/> PRO-JECT <input type="checkbox"/> LOC <input type="checkbox"/> OTHER:						EACH OCCURRENCE DAMAGE TO RENTED PREMISES (Ea occurrence) MED EXP (Any one person) PERSONAL & ADV INJURY GENERAL AGGREGATE PRODUCTS - COMP/OP AGG	
	<b>AUTOMOBILE LIABILITY</b> <input type="checkbox"/> ANY AUTO <input type="checkbox"/> OWNED AUTOS ONLY <input type="checkbox"/> HIRED AUTOS ONLY <input type="checkbox"/> SCHEDULED AUTOS <input type="checkbox"/> NON-OWNED AUTOS ONLY						COMBINED SINGLE LIMIT (Ea accident) BODILY INJURY (Per person) BODILY INJURY (Per accident) PROPERTY DAMAGE (Per accident)	
	<b>UMBRELLA LIAB</b> <input type="checkbox"/> OCCUR <b>EXCESS LIAB</b> <input type="checkbox"/> CLAIMS-MADE <input type="checkbox"/> DED <input type="checkbox"/> RETENTION						EACH OCCURRENCE AGGREGATE	
	<b>WORKERS COMPENSATION AND EMPLOYERS' LIABILITY</b> ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH) If yes, describe under DESCRIPTION OF OPERATIONS below	Y/N <input type="checkbox"/> N/A					<input type="checkbox"/> PER STATUTE <input type="checkbox"/> OTH-ER E.L. EACH ACCIDENT E.L. DISEASE-EA EMPLOYEE E.L. DISEASE-POLICY LIMIT	
A	<b>E&amp;O - Professional Liability - Primary</b>			18255420 Claims Made SIR applies per policy terms & conditions	11/01/2024	11/01/2025	Per Claim/Aggregate SIR	\$10,000,000 \$30,000,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)  
Evidence of Insurance.

### CERTIFICATE HOLDER

### CANCELLATION

CBRE Group, Inc. and Subsidiaries 2121 N. Pearl Street Suite 300 Dallas TX 75201 USA	SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS. <b>AUTHORIZED REPRESENTATIVE</b> 
-----------------------------------------------------------------------------------------------	--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------

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ACORD 25 (2016/03)

The ACORD name and logo are registered marks of ACORD



## Proof of Licenses/Certifications

Name:	<b>KORST, LEE ANN LLC</b>	License Number:	<b>SL3242575</b>
Rank:	<b>Real Estate Sales Associate</b>	License Expiration Date:	<b>09/30/2026</b>
Primary Status:	<b>Current</b>	Original License Date:	<b>02/21/2011</b>
Secondary Status:	<b>Active</b>		

### Related License Information

License Number	Status	Related Party	Relationship Type	Relation Effective Date	Rank	Expiration Date
CQ224480	Current, Active	CBRE INC	Employed By	04/05/2011	Real Estate Corporation	03/31/2026

Name:	<b>WATSON, THOMAS DAVID LLC</b>	License Number:	<b>SL3231614</b>
Rank:	<b>Real Estate Sales Associate</b>	License Expiration Date:	<b>09/30/2025</b>
Primary Status:	<b>Current</b>	Original License Date:	<b>03/15/2010</b>
Secondary Status:	<b>Active</b>		

### Related License Information

License Number	Status	Related Party	Relationship Type	Relation Effective Date	Rank	Expiration Date
CQ224480	Current, Active	CBRE INC	Employed By	12/02/2015	Real Estate Corporation	03/31/2026

Name:	<b>FORSYTHE, ELIZABETH OTTE</b>	License Number:	<b>SL3245627</b>
Rank:	<b>Real Estate Sales Associate</b>	License Expiration Date:	<b>03/31/2025</b>
Primary Status:	<b>Current</b>	Original License Date:	<b>05/23/2011</b>
Secondary Status:	<b>Active</b>		

### Related License Information

License Number	Status	Related Party	Relationship Type	Relation Effective Date	Rank	Expiration Date
CQ224480	Current, Active	CBRE INC	Employed By	03/30/2021	Real Estate Corporation	03/31/2026

Name:	<b>HERRERA, SAMANTHA E LLC</b>	License Number:	<b>SL3525115</b>
Rank:	<b>Real Estate Sales Associate</b>	License Expiration Date:	<b>09/30/2025</b>
Primary Status:	<b>Current</b>	Original License Date:	<b>01/08/2022</b>
Secondary Status:	<b>Active</b>		

### Related License Information



License Number	Status	Related Party	Relationship Type	Relation Effective Date	Rank	Expiration Date
CQ224480	Current, Active	CBRE INC	Employed By	01/10/2022	Real Estate Corporation	03/31/2026


Name:	<b>MCSHEA, MICHAEL B</b>	License Number:	<b>BK3077020</b>
Rank:	<b>Real Estate Broker Sales Associate</b>	License Expiration Date:	<b>09/30/2025</b>
Primary Status:	<b>Current</b>	Original License Date:	<b>02/24/2004</b>
Secondary Status:	<b>Active</b>		

### Related License Information

License Number	Status	Related Party	Relationship Type	Relation Effective Date	Rank	Expiration Date
CQ224480	Current, Active	CBRE INC	Employed By	11/02/2022	Real Estate Corporation	03/31/2026

In lieu of Local Business Tax Receipt, we have provided brokerage licenses from the DBPR for the local and additional office locations as well as our State of Florida certificate to do business.

THE OFFICE OF THE FLORIDA DEPARTMENT OF BUSINESS & PROFESSIONAL REGULATION		
		
<b>ONLINE SERVICES</b>	<b>LICENSEE DETAILS</b>	
<a href="#">Apply for a License</a>	<b>License Information</b>	<b>HOME    CONTACT US    MY ACCOUNT</b>
<a href="#">Verify a Licensee</a>		<b>11/11/AM 2020/05/30</b>
<a href="#">File a Fals &amp; Lgong Inspection</a>	Name:	CBSR INC (primary Name)
<a href="#">File a Complaint</a>	Address:	CBSR INC cda Name 777 BROOKLYN AVENUE SUITE 1100 MIAMI Florida 33131
<a href="#">Contacting Education Course Search</a>	County:	DADE
<a href="#">View Application Status</a>	License Mailing:	1 INDEPENDENT DRIVE, SUITE 3000 JACKSONVILLE FL, 32202
<a href="#">Find Exam Information</a>	County:	DUVAL
<a href="#">Unauthorized Activity Search</a>	License Location:	600 GRAND BLVD SUITE 207 MILANEA BEACH FL 32550
<a href="#">ABE! Equivalent Inmate &amp; Aduity List Search</a>	County:	WILTON
<b>License Information</b>		
License Type:	Real Estate Branch Office	
Branch:	HS Branch Office	
License Number:	B0033887	
Status:	Current/Active	
Licenseure Date:	01/01/2021	
Expires:	03/31/2026	
<b>Special Qualifications</b>	<b>Qualification Effective</b>	
<b>Alternate Names</b>		
<a href="#">View Related License Information</a>		
<a href="#">View License Complaint</a>		



THE OFFICIAL SITE OF THE FLORIDA DEPARTMENT OF BUSINESS & PROFESSIONAL REGULATION

[HOME](#)
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[File a Complaint](#)  
[Continuing Education Course Search](#)  
[View Application Status](#)  
[Find Exam Information](#)  
[Unlocked Academy Search](#)  
[AB&T Delinquent Invoice & Activity List Search](#)

[LICENSEE STATUS DETAILS](#)

10/13 10 AM 2020/10/20

Name: <b>CIBRE INC (Primary Name)</b> 777 BRICKELL AVENUE SUITE 1100 MIAMI, FLORIDA 33131 DATE:	
County:	
License Number: <b>1 INDEPENDENT DRIVE SUITE 3000 JACKSONVILLE FL 32202 DUNAL</b>	
County:	
License Location: <b>1 INDEPENDENT DRIVE SUITE 3000 JACKSONVILLE FL 32202 DUNAL</b>	
County:	
License Information	
License Type: <b>Real Estate Branch Office</b>	
Firm: <b>RE Branch Office</b>	
License Number: <b>BD0318460</b>	
Status: <b>Current/Active</b>	
License Date: <b>6/17/2024</b>	
Expires: <b>6/30/2026</b>	
Special Qualifications	Qualification Effective
<input type="text"/>	
<b>Alternate Names</b>	
<input type="text"/>	

[View Related License Information](#)  
[View License Complaint](#)

2021 [White Paper](#), [Telephone FL 32399](#) - Email [Customer Contact Center](#) - [Customer Contact Center](#) 850.407.1395

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Under Florida law, email addresses are public records. If you do not want your email address released in response to a public records request, do not send electronic mail. Contact the office by phone or by traditional mail. If you have any questions, please contact 850.407.1395. Pursuant to Section 68A.27(1), Florida Statutes, 2012, licenses issued under Chapter 455, F.S. must provide the Department with an email address if they have one. The email address provided may be used for official correspondence. However email addresses are public record. If you do not wish to supply a personal address, please provide the Department with an email address which contains no public information. Please see our [Chapter 455](#) page to determine if you are affected by this change.

[illegible]

## Tax Identification Number (TID)

USA CBRE, Inc.,  
Federal Tax ID#  
(FEIN): **95-2743174**

W-9

Form 1099-INT  
(Rev. October 2009)  
Department of the Treasury  
Internal Revenue Service

# Request for Taxpayer Identification Number and Certification

## Get Form to the requester. Do not send to the IRS.

Go to [www.irs.gov/Form990](http://www.irs.gov/Form990) for instructions and the latest information.

Print or type.  
See Specific Instructions on page 2.

CBRE, Inc.

1 Name (as shown on your income tax return). Name different from this line? Do not leave this line blank.

2 Business name/disregarded entity name, if different from above

3 Check appropriate box for federal tax classification of the person whose name is entered on line 1. Check only one of the following (see below):

☐ Individual sole proprietor or single-member LLC ☐ C Corporation ☐ S Corporation ☐ Partnership ☐ Trust/estate

☐ Limited liability company (enter the tax classification (C=C Corporation, S=S Corporation, P=Partnership) ▶

**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.

☐ Other (see instructions) ▶

4 Address, street, and apt. or suite no. See instructions.  
P.O. Box 49600, Los Angeles, CA 90046

5 City, state, and ZIP code  
Atlanta, GA 30384-6588

7 List current account number (if optional)

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3).  
Enter payee code (if any):

Exemption from FATCA reporting code (if any)

*(Applies to accounts maintained outside the U.S.)*

Requester's name and address (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, use the instructions for Part I, later. For other entities, use the taxpayer identification number (EIN). If you do not have a number, see **What to do if a TIN is not available**, later.

**Note:** If the employer is in more than one state, use the instructions for line 1. Also see **What Name and Number To Use for the TIN**, later.

### Part II Certification

Under penalties of perjury, I certify that:

1. 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
2. I am not subject to backup withholding; (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
3. I am a U.S. citizen or other U.S. person (defined below); and
4. 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, line 2 does not apply. For mortgage interest paid, backup withholding does not apply. If you are not a U.S. citizen or other U.S. person, check contributions to an individual retirement arrangement (IRA), and all 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 Signature of U.S. person *Case Page* Date **6/5/24**

## General Instructions

Section references are to the Internal Revenue Manual unless otherwise specified.

**Future developments.** For the latest information about developments related to Form W-9 and its instructions, such as legislation enacted and when they were published, go to [www.irs.gov/Form990](http://www.irs.gov/Form990).

## Purpose of Form

An individual or other U.S. 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 information that you are required to report on an information return. Information may, but is 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 1099-I (mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (cancelled 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.**

*State of Florida*  
*Department of State*

I certify from the records of this office that CBRE, INC. is a Delaware corporation authorized to transact business in the State of Florida, qualified on October 22, 1980.

The document number of this corporation is 847299.

I further certify that said corporation has paid all fees due this office through December 31, 2024, that its most recent annual report/uniform business report was filed on April 18, 2024, and that its status is active.

I further certify that said corporation has not filed a Certificate of Withdrawal.

*Given under my hand and the  
Great Seal of the State of Florida  
at Tallahassee, the Capital, this  
the Twenty-eighth day of May,  
2024*



  
Secretary of State

Tracking Number: 8627203057CU

To authenticate this certificate, visit the following site, enter this number, and then follow the instructions displayed.

<https://services.sunbiz.org/Filings/CertificateOfStatus/CertificateAuthentication>

# 1. Public Entity Crimes

## ATTACHMENT #1 – PUBLIC ENTITY CRIMES

### CITY OF CRESTVIEW, FLORIDA REQUEST FOR PROPOSAL (RFP) [25-02-27-FS]

SWORN STATEMENT UNDER SECTION 287.133 (3) (A) FLORIDA STATUTES, ON  
PUBLIC ENTITY CRIMES

THIS FORM MUST BE SIGNED IN THE PRESENCE OF A NOTARY PUBLIC OR OTHER  
OFFICER AUTHORIZED TO ADMINISTER OATHS.

1. This sworn statement is submitted with Bid, Proposal or Contract  
25-02-27-FS Real Estate and Property Management Services [number/title]

2. This sworn statement is submitted by CBRE, Inc.

[name of company/firm]  
whose business address is 600 Grand Boulevard, Miramar Beach, Florida 32550 and (if  
applicable) Federal Employer Identification Number (FEIN) is 95-2743174. If  
the entity has no FEIN, include the Social Security Number of the individual signing  
this sworn statement: \_\_\_\_\_

3. My name is Tommie Reilly and my relationship to the entity named  
above is Managing Director.

4. I understand that a "public entity crime" as defined in Paragraph  
287.133(a)(g), Florida Statutes, means a violation of any state or federal law by  
a person with respect to and directly related to the transaction of business with  
any public entity or with an agency or political subdivision of any other state or  
with the United States, including, but not limited to, any bid or contract for goods  
or services to be provided to any public entity or any agency or political subdivision  
of any other state or of the United States and involving antitrust, fraud, theft,  
bribery, collusion, racketeering, conspiracy, or material misrepresentation.

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

6. I understand that an "affiliate" as defined in Paragraph 287.133(1)(a), Florida  
Statutes, means:

- a. A predecessor or successor of a person convicted of a public entity crime;  
or

(Page 1 of 3 ATTACHMENT #1)

b. An entity under the control of any natural person who is active in the  
management of the entity and who has been convicted of a public entity  
crime.

c. The term "affiliate" includes those officers, directors, executives, partners,  
shareholders, employees, members, and agents who are active in the  
management of an affiliate. The ownership by one of shares constituting a  
controlling income among persons when not for fair interest in another  
person, or a pooling of equipment or income among persons when not for  
fair market value under a length agreement, shall be a prima facie case  
that one person controls another person. A person who was knowingly  
convicted of a public entity crime, in Florida during the preceding 36  
months shall be considered an affiliate.

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

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

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

\_\_\_\_\_The entity submitting this sworn statement, or one or more of the officers,

directors, executives, partners, shareholders, employees, members, or agents  
who are active in management of the entity, or an affiliate of the entity has been  
charged with and convicted of a public entity crime subsequent to July 1, 1989.  
(Please attach a copy of the final order)

\_\_\_\_\_The person or affiliate was placed on the convicted vendor list. There has  
been a subsequent proceeding before a hearing officer of the State of Florida,  
Division of Administrative Hearings. The final order entered by the hearing officer  
determined that it was in public interest to remove the person or affiliate from the  
convicted vendor list. (Please attach a copy of the final order)

(Page 2 of 3 ATTACHMENT #1)

\_\_\_\_\_The person or affiliate has not been placed on the convicted vendor list.  
(Please describe any action taken by, or pending with, the Department of General  
Services.)

  
(Signature)

February 27, 2025

Date:

STATE OF FLORIDA  
COUNTY OF Duval

The foregoing instrument was sworn to (or affirmed), subscribed, and  
acknowledged before me by means of ☒ physical appearance or ☐ online  
notarization, this 27<sup>th</sup> day of Feb 2025 by Tommie Reilly who is  
personally known to me or has produced \_\_\_\_\_ as identification.

My Commission Expires:

May 11, 2025

Notary Public



LINDA J. DUELL  
Commission # HH 126718  
Expires May 11, 2025  
Bonded Through Budget Notary Services

(Page 3 of 3 ATTACHMENT #1)



## 2. Drug Free Workplace

### ATTACHMENT #2 – DRUG FREE WORKPLACE

#### CITY OF CRESTVIEW, FLORIDA REQUEST FOR PROPOSAL (RFP) [25-02-27-FS] DRUG-FREE WORKPLACE CERTIFICATION

The below signed Bidder certifies that it has implemented a drug-free workplace program. To have a drug-free workplace program, a business shall:

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

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

Bidder/Contractor Name: CBRE, Inc.

Mailing Address: 600 Grand Boulevard, Miramar Beach, Florida 32550

Telephone Number: 904 588 8198

Fax Number: \_\_\_\_\_

E-mail Address: tommie.reilly@cbre.com

FEIN: 95-2743174

  
Authorized Signature

Tommie Reilly, Managing Director  
Printed Name/Title

February 27, 2025  
Date

### 3. Conflict of Interest Statement

#### ATTACHMENT #3- CONFLICT OF INTEREST STATEMENT

**CITY OF CRESTVIEW, FLORIDA  
REQUEST FOR PROPOSAL (RFP) [25-02-27-FS]  
CONFLICT OF INTEREST STATEMENT**

**A. THIS SWORN STATEMENT IS SUBMITTED**

BY CBRE, Inc.

[Name of entity submitting sworn statement]

whose business address

is 600 Grand Boulevard Miramar Beach, Florida 32550

and (if applicable) its Federal Employer Identification Number  
(FEIN) is 95-2743174.

My name is Tommie Reilly and my relationship to the  
above entity is Managing Director.

[Please print name of individual signing]

**B. CONFLICT OF INTEREST**

1. The entity hereby submits a proposal/offer to RFP # 25-02-27-FS for Real Estate and Property Management Services Services.
2. The AFFIANT has made diligent inquiry and provided the information in this statement affidavit based upon its full knowledge.
3. The AFFIANT states that only one submittal for this solicitation has been submitted and tendered by the appropriate date and time and that said above stated entity has no financial interest in other entities submitting a proposal for the work contemplated hereby.
4. Neither the AFFIANT nor the above named entity has directly or indirectly entered into any agreement, participated in any collusion or collusive activity, or otherwise taken any action which in any way restricts or restrains the competitive nature of this solicitation, including but not limited to the prior discussion of terms, conditions, pricing, or other offer parameters required by this solicitation.
5. Neither the entity nor its affiliates, nor anyone associated with them, is presently suspended, or otherwise prohibited from participation in this solicitation or any contract to follow thereafter by any government entity.
6. Neither the entity nor its affiliates, nor anyone associated with them, have any potential conflict of interest because and due to any other clients, contracts, or property interests in this solicitation or the resulting project.
7. I hereby also certify that no member of the entity's ownership or management or staff has a vested interest in any City Division/Department/Office.
8. I certify that no member of the entity's ownership or management is presently applying, actively seeking, or has been selected for an elected position within City of Crestview government.

9. In the event that a conflict of interest is identified in the provision of services, I, the undersigned will immediately notify the City in writing.

**C. NON-COLLUSION PROVISION CERTIFICATION**

The undersigned hereby certifies, to the best of his or her knowledge and belief, that on behalf of the person, firm, association, or corporation submitting the bid certifying that such person, firm, association, or corporation has not, either directly or indirectly, entered into any agreement, participated in any collusion, or otherwise taken any action, in restraint of free competitive bidding in connection with the submitted bid. Failure to submit the executed statement as part of the bidding documents will make the bid nonresponsive and not eligible for award consideration.

**D. LOBBYING CERTIFICATION**

The undersigned hereby certifies, to the best of his or her knowledge and belief, that:

1. No City appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence either directly or indirectly an officer or employee of the City, City Council Member of Congress in connection with the awarding of any City Contract.
2. If any funds other than City appropriated funds have been paid or will be paid to any person for influencing or attempting to influence a member of City Council or an officer or employee of the City in connection with this contract, the undersigned shall complete and submit Standard Form-L "Disclosure Form to Report Lobbying", in accordance with its instructions.

By the signature(s) below, I/we, the undersigned, as authorized signatory to commit the firm, certify that the information as provided in this Conflict of Interest and Non-Collusion Statement, is truthful and correct at the time of submission.

Bidder/Contractor Name: CBRE, Inc.

Mailing Address: 600 Grand Boulevard Miramar Beach, Florida 32550

Telephone Number: 904 588 8198

Fax Number: \_\_\_\_\_

E-mail Address: tommie.reilly@cbre.com

FEIN: 95-2743174

  
Authorized Signature

Tommie Reilly, Managing Director  
Printed Name/Title

February 27, 2025  
Date

(Page 2 of 2 ATTACHMENT #3)

(Page 1 of 2 ATTACHMENT #3)




## 4. Liability and Indemnification

### ATTACHMENT #4 – LIABILITY & INDEMNIFICATION

#### CITY OF CRESTVIEW, FLORIDA REQUEST FOR PROPOSAL (RFP) [25-02-27-FS] LIABILITY & INDEMNIFICATION FORM

To the fullest extent permitted by law, CONSULTANT shall indemnify and hold harmless CITY, its officers and employees from liabilities, damages, losses, and costs including but not limited to reasonable attorney fees, to the extent caused by the negligence, recklessness, or intentional wrongful conduct of the CONSULTANT and other persons employed or utilized by the CONSULTANT in the performance of this Agreement.

Bidder/Contractor Name: CBRE, Inc.  
Mailing Address: 600 Grand Boulevard, Miramar Beach, Florida 32550  
Telephone Number: 904 588 8198 Fax Number: \_\_\_\_\_  
E-mail Address: tommie.reilly@cbre.com FEIN: 95-2743174

 \_\_\_\_\_  
Authorized Signature Printed Name/Title Date  
Tommie Reilly, Managing Director February 27, 2025

## 5. Addendum Receipt Acknowledgement

### ATTACHMENT #5 - ADDENDUM RECEIPT ACKNOWLEDGEMENT

#### CITY OF CRESTVIEW, FLORIDA REQUEST FOR PROPOSAL (RFP) [25-02-27-FS]

The undersigned acknowledges receipt of the following addenda to the solicitation document(s) (Give number and date of each):

Addendum No. 1 Dated: 2/24/2025

Addendum No. 2 Dated: 2/25/2025


Addendum No. \_\_\_\_\_ Dated: \_\_\_\_\_

Addendum No. \_\_\_\_\_ Dated: \_\_\_\_\_

Addendum No. \_\_\_\_\_ Dated: \_\_\_\_\_

By the signature(s) below, I/we, the undersigned, as authorized signature to commit the firm, certify that the information as provided in the Addendum Receipt Acknowledgement Certification, is truthful and correct at the time of submission.

Bidder/Contractor Name: CBRE, Inc.  
Mailing Address: 600 Grand Boulevard, Miramar Beach, Florida 32550  
Telephone Number: 904 588 8198 Fax Number: \_\_\_\_\_  
E-mail Address: tommie.reilly@cbre.com FEIN: 95-2743174

 \_\_\_\_\_  
Authorized Signature Printed Name/Title Date  
Tommie Reilly, Managing Director February 27, 2025



## 6. Public Access Form


### ATTACHMENT #6 – PUBLIC ACCESS FORM

**CITY OF CRESTVIEW, FLORIDA  
REQUEST FOR PROPOSAL (RFP) [25-02-27-FS]  
PROPOSAL FOR [Real Estate and Property Management]  
PUBLIC ACCESS FORM**

CBRE, Inc., \_\_\_\_\_, as Proposer, shall comply with the requirements of Florida's Public Records law. In accordance with Section 119.0701, Florida Statutes, Contractor shall:

- a. Keep and maintain public records required by the public agency in order to perform the service.
- b. Upon request from the public agency's custodian of public records, provide the public agency with a copy of the requested records or allow the records to be inspected or copied within a reasonable time at a cost that does not exceed the cost provided under Florida's Public Records Law or as otherwise provided by law.
- c. Ensure that public records that are exempt or confidential and exempt from public records disclosure requirements are not disclosed except as authorized by law for the duration of the contract term and following completion of this contract if Contractor does not transfer the records to the public agency; and
- d. Upon completion of the contract, transfer, at no cost, to the public agency all public records in possession of Contractor or keep and maintain public records required by the public agency to perform the service. If Contractor transfers all public records to the public agency upon completion of the contract, Contractor shall destroy any duplicate public records that are exempt or confidential and exempt from public records disclosure requirements. If Contractor keeps and maintains public records upon completion of this contract, the Contractor shall meet all applicable requirements for retaining public records. All records stored electronically must be provided to the public agency, upon request from public agency's custodian of public records, in a format that is compatible with the information technology systems of the public agency.
- e. **IF THE CONTRACTOR HAS QUESTIONS REGARDING THE APPLICATION OF CHAPTER 119, FLORIDA STATUTES, TO THE CONTRACTOR'S DUTY TO PROVIDE PUBLIC RECORDS RELATING TO THIS AGREEMENT, CONTACT THE CITY'S CUSTODIAN OF PUBLIC RECORDS, ATTN: Maryanne Girard, City Clerk, (850) 682-1560 Extension 250, [cityclerk@cityofcrestview.org](mailto:cityclerk@cityofcrestview.org), 198 North Wilson Street, P.O. Box 1209, Crestview, Florida 32536.**
- f. In the event the public agency must initiate litigation against Contractor in order to enforce compliance with Chapter 119, Florida Statutes, or in the event of litigation filed against the public agency because Contractor failed to provide access to public records responsive to a public record request, the public agency shall be entitled to recover all costs, including but not limited to reasonable attorneys' fees, costs of suit, witness fees, and expert witness fees extended as part of said litigation and any subsequent appeals.

Bidder/Contractor Name: CBRE, Inc.  
Mailing Address: 600 Grand Boulevard, Miramar Beach, Florida 32550  
Telephone Number: 904 588 8198 Fax Number: \_\_\_\_\_  
E-mail Address: tommie.reilly@cbre.com FEIN: 95-2743174

 \_\_\_\_\_  
Authorized Signature Printed Name/Title Date  
Tommie Reilly, Managing Director February 27, 2025

## 7. Certification Re: Scrutinized Companies

### ATTACHMENT #7 - CERTIFICATION RE: SCRUTINIZED COMPANIES

"Company" means Contractor throughout this exhibit. Section 287.135, Florida Statutes, prohibits companies from bidding, submitting proposals, entering into or renewing contracts with a local government for goods or services over one million dollars if that company is on the Scrutinized Companies with Activities in Sudan List, on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List or that is engaged in business operations in Syria. Both lists are created pursuant to Section 215.473, Florida Statutes.

In addition, regardless of contract value, the companies may not be listed on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, Florida Statutes, or be engaged in a boycott of Israel, if bidding, submitting proposals, entering into or renewing contacts with a local government for goods and services.

As the person authorized to sign on behalf of the company, I hereby certify that the company identified below is not listed on the Scrutinized Companies with Activities in Sudan List, is not listed on the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, and is not engaged in business operations in Syria. In addition, the company is not listed on the Scrutinized Companies that Boycott Israel List, created pursuant to Section 215.4725, Florida Statutes, and is not participating in a boycott of Israel.

I further understand that pursuant to the Florida Statutes, any contract with the City for goods or services of any amount may be terminated at the option of the City if the company (i) is found to have submitted a false certification, (ii) has been placed on the Scrutinized Companies that Boycott Israel List, or (iii) is engaged in a boycott of Israel. And, in addition to the foregoing, if the amount of the contract is one million dollars (\$1,000,000) or more, the contract may be terminated at the option of the City if the company is found to have submitted a false certification, has been placed on the Scrutinized Companies with Activities in Sudan List or the Scrutinized Companies with Activities in the Iran Petroleum Energy Sector List, or has been engaged in business operations in Syria.

This Certification is deemed amended by any amendments to Fla. Stat. 287.135 binding on the City.

#### (page 1 of 2, Attachment #7)

By the signature(s) below, I/we, the undersigned, as authorized signatory to commit the company, certify that the information as provided in this Contractor Certification Regarding Scrutinized Companies, is truthful and correct at the time of submission.

Bidder/Contractor Name: CBRE, Inc.

Mailing Address: 600 Grand Boulevard, Miramar Beach, Florida 32550

Telephone Number: 904 588 8198

Fax Number: \_\_\_\_\_

E-mail Address: tommie.reilly@cbre.com

FEIN: 95-2743174

  
Authorized Signature

Tommie Reilly, Managing Director

Printed Name/Title

February 27, 2025

Date

#### (page 2 of 2, Attachment #7)



## 8. Subcontractor Participation

### ATTACHMENT #8 - SUBCONTRACTOR PARTICIPATION

<input type="checkbox"/> No Subcontracting (of any kind) will be utilized on this project.		Solicitation Number: 25-02-27-FS	
Title: Real Estate and Property Management		Total Project Amount: \$ TBD	
Subcontractor Minority Code (if applicable)	Company Name	Trade, Services or Materials portion to be subcontracted	Percent (%) of Scope/Contract TBD
Federal ID	Address Phone, Fax, Email		Dollar Value
Fed ID: 37-1902925	Company Name: NAI Pensacola	Selected Property Management Services	TBD
	Address: 24 W. Chase St. Pensacola, FL. 32502		
	Phone Number: +1 850 433 0577		
	naipensacola.com		
PERCENTAGE TOTALS FOR SUBCONTRACTOR PARTICIPATION			TBD
PERCENTAGE TOTALS FOR MINORITY SUBCONTRACTOR PARTICIPATION			

Minority Code	Code Description	Minority Code	Code Description
(MBE) AA	African American	(MBE) NA	Native American
(MBE) A	Asian/Pacific Islander	WBE	Woman-Owned Business Enterprise
(MBE) H	Hispanic	VBE	Veteran-Owned Business Enterprise

**(page 1 of 2, Attachment #8)**

When applicable, the Proposer will enter into a formal agreement with the subcontractors identified herein for work listed in this schedule conditioned upon execution of a contract with the City. By the signature(s) below, I/we, the undersigned, as authorized signatory to commit the firm, certify that the information as provided in the **Proposed Schedule of Subcontractor Participation**, is truthful and correct at the time of submission.

Bidder/Contractor Name: CBRE, Inc.

Mailing Address: 600 Grand Boulevard, Miramar Beach, Florida 32550

Telephone Number: 904 588 8198

Fax Number:

E-mail Address: tommie.reilly@cbre.com

FEIN: 95-2743174

  
Authorized Signature

Tommie Reilly, Managing Director  
Printed Name/Title

February 27, 2025  
Date

**(page 2 of 2, Attachment #8)**

## 9. References

***Please see Tab B, page 19, for completed Form #9: References***



# E

CBRE



## Additional Information

# Additional Services

[Redacted]

[Redacted]

Proven Transparent Process: Combine public sector requirements with best practices in private sector marketing and development

[Redacted]

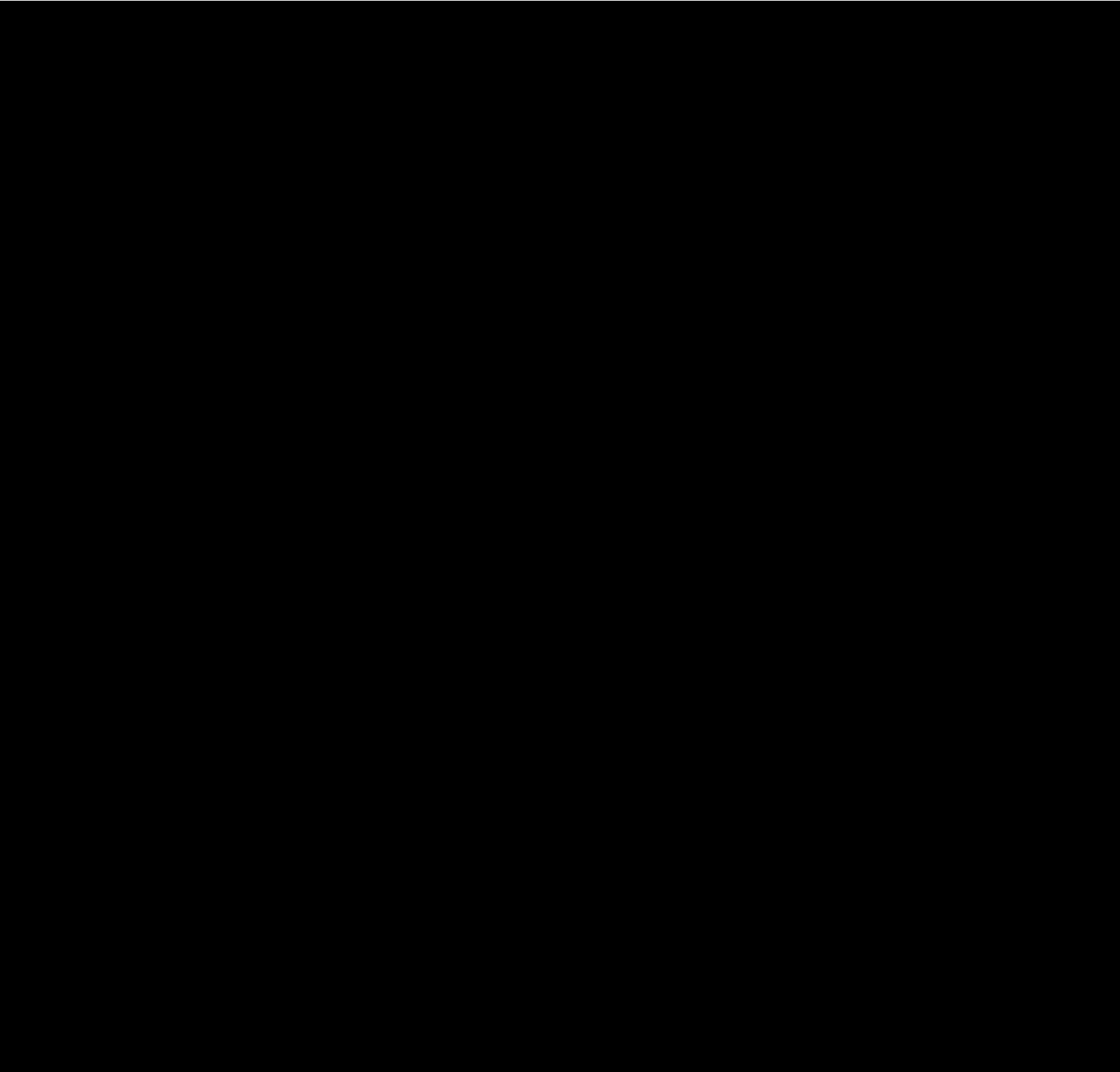
623

[Redacted]

# Additional Services

## Meeting Attendance

As is customary on nearly all of CBRE's public and private sector engagements, the CBRE team is adept at presenting and briefing to a wide variety of audiences. We frequently brief and present to leadership teams, Boards, City Councils and Commissions as well as interested community groups and vested stakeholders.





# Relevant Platform Services

## Capital Markets

CBRE Capital Markets is the **#1 ranked brokerage firm globally with 23.5% market share**. We provide proactive insights and executable strategies to unlock hidden value, drive returns and enhance outcomes for our clients' real estate investments.

Our trusted, tenured experts seamlessly collaborate to help clients connect to global capital and opportunities through a cohesive, cross-disciplinary service offering. We unlock hidden value, drive returns and enhance outcomes for your real estate investments, in all geographies and across all asset classes.

### INVESTMENT PROPERTIES

Offers customized investment dispositions, acquisition and recapitalization services, together with industry-leading, proprietary intelligence, to connect investors to the right properties at the right time.

### DEBT & STRUCTURED FINANCE

Synthesizes a global ecosystem of lenders and capital sources to provide debt and equity financing to developers and owners for all property types, achieving the best financing terms for our clients.



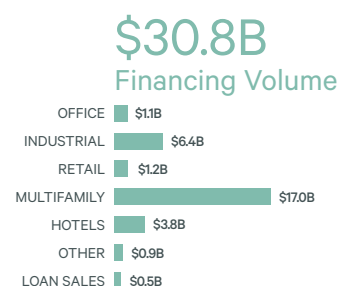
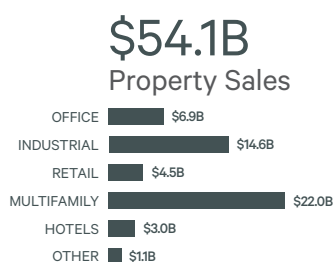
### INVESTMENT BANKING

Solves critical business problems for clients by providing investor access and strategic advice across the spectrum of real estate investment banking activities, including M&A advisory, equity placement, secondary LP trading and investment advisory.

## Property Type Specialties

- |               |                         |                  |                        |                   |
|---------------|-------------------------|------------------|------------------------|-------------------|
| – Office      | – Affordable Housing    | Markets          | – Healthcare           | – Parking         |
| – Industrial  | – Auto Dealership       | – Data Centers   | – Land Services        | – Self Storage    |
| – Retail      | – Aviation              | – Gaming         | – Life Sciences        | – Senior Housing  |
| – Multifamily | – Build-to-Rent Housing | – Golf & Resorts | – Manufactured Housing | – Student Housing |
| – Hotels      | – Corporate Capital     | – Government     | – Net Lease            |                   |

## U.S. Capital Markets Activity



# Relevant Platform Services

## Valuation & Advisory Services

CBRE provides valuation, advisory and assessment services for real estate owners, investors and lenders. We help clients make confident, informed business decisions by combining our specialized expertise and premier technologies to deliver industry-leading analyses.

With 91 Valuation & Advisory offices across the country, the County will have access to an industry-leading network of appraisers and national portfolio coverage.

760+

U.S. Valuation  
Producers

91+

U.S. Valuation  
Offices

70K+

U.S. Valuation Yearly  
Assignments

### Valuation & Appraisal

- Property and Portfolio Appraisals
- Market and Feasibility Studies
- Evaluations (Alternative Valuations)
- Financial and Tax Reporting
- Litigation Support and Testimony
- Right-of-Way and Eminent Domain

### Property & Transaction Tax

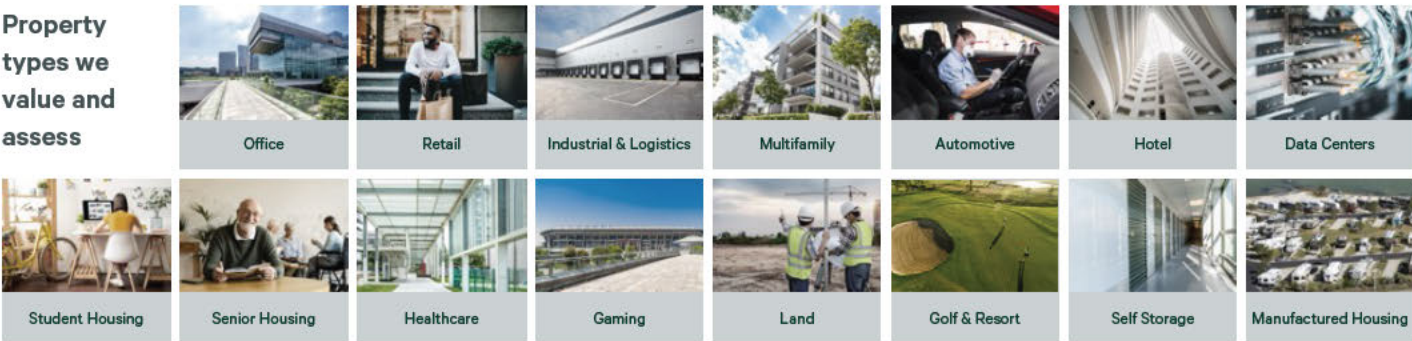
- Property Tax Assessment and Appeals
- Budgets, Accruals and Pre-Acquisition Due Diligence
- Real Estate Transaction Tax
- Property Tax Payment Services

### Assessment & Consulting

- Property Condition Assessments (PCA)
- Environmental Site Assessments (ESA) & Consulting
- Fannie Mae & Freddie Mac Agency Scopes
- Land Surveying & Zoning Compliance

**CBRE offers a full spectrum of due diligence services.** The County's property value is a key factor in guiding real estate decisions. In today's ever-changing market, you need access to the most comprehensive, real-time data and skilled professionals who derive intelligence from analytics. We help you realize the true value of your property with trusted real estate insights from the most recognized professionals in the industry.

### Property types we value and assess





# Relevant Platform Services

## Project Management

8K+

52K+

350+

\$124.3B

### By the Numbers

PROFESSIONALS

PROJECTS MANAGED

LEED PROFESSIONALS

ANNUAL MANAGED CAPITAL

We have built one of the world's largest networks of commercial real estate project managers. Our professionals will plan and execute a full suite of customized services on your behalf, from managing and negotiating project costs and mitigating risk to accelerating project delivery and maximizing scheduling opportunities. Our team will use an optimized service delivery process to manage every aspect of your project's budget, schedule, and scope while we protect your interests throughout your entire real estate journey.

CBRE's 9,000+ Project Management professionals advise occupiers and investors on 52,000+ projects each year. Our integrated team can seamlessly deliver projects and potentially help you realize 12% typical cost savings thanks to our 7:1 value-to-fee ratio. We will help implement cost-efficient, scalable staffing models to make your on-site activities and use of capital more efficient through multiple integrated service offerings.



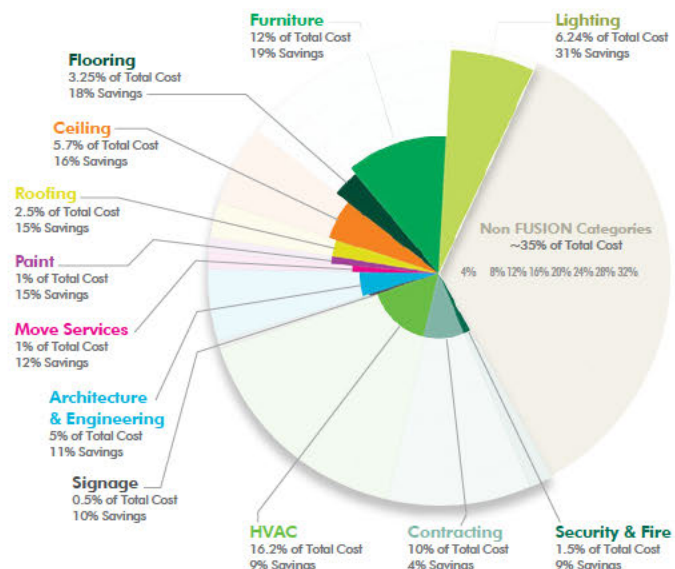
### CBRE's End-to-End Services

- Brand Enhancement
- Building Certifications
- Capital Planning
- Change Management
- Commissioning
- Construction Risk Management
- Cost Consultancy
- Decommissioning
- Development Monitoring
- Dilapidations
- Document Control
- Engineering
- Engineering Design
- Environmental & Feasibility
- Facility Assessment Consulting
- Furniture Advisory
- Health & Safety (QHSE)
- Interior Design/BIM
- Move Management
- Occupancy Management
- Office Ready
- Procurement & Supply Chain Sourcing
- Program Management
- Project Management
- Project Management Office (PMO)
- Reinstatement Cost Assessments
- Sustainability & Energy Consulting
- Tax Depreciation: Cost Segregation
- Workplace Consulting
- Workplace Technology Services



### CBRE FUSION SAVINGS

CBRE's Fusion program is a true value-add service for CBRE Project Management clients with no additional fees. FUSION utilizes CBRE's global, national, and regional scale to drive cost reduction and savings by working with qualified service providers and suppliers. Clients have access to preferred pricing, exclusive offerings, and select complimentary support services from Fusion partners, among other benefits.





## Projects performed for agencies in the State of Florida during the last 3 years

Agency	Deal Type	F	Date Closed
	Consulting	0	10/26/21
	Consulting	0	10/29/21
	Consulting	0	9/1/22
	Consulting	0	9/6/22
	Consulting	0	10/25/22
	Consulting	0	1/18/23
	Consulting	0	8/28/23
	Consulting	0	9/25/23
	Consulting	0	10/18/23
	Consulting	0	4/19/24
	Consulting	0	5/6/24
	Lease - Landlord	0	2/4/2025
	Lease - Tenant	7,594	6/10/2021
	Lease - Tenant	4,878	8/24/2021
	Lease - Tenant	,500	4/6/2021
	Lease - Tenant	,999	10/14/2021
	Lease - Tenant	6,420	5/23/2022
	Lease - Tenant	3,252	6/25/2021
	Lease - Tenant	8,372	6/10/2021
	Lease - Tenant	4,753	1/28/2021
	Lease - Tenant	9,789	4/5/2021
	Lease - Tenant	8,999	12/2/2021
	Lease - Tenant	7,518	6/10/2021
	Lease - Tenant	3,502	6/17/2021
	Lease - Tenant	1,505	6/17/2021
	Lease - Tenant	6,514	10/13/2021
	Lease - Tenant	,049	6/10/2021
	Lease - Tenant	,300	6/17/2021
	Lease - Tenant	9,813	8/6/2021
	Lease - Tenant	1,507	8/16/2021
	Lease - Tenant	2,458	8/16/2021
	Lease - Tenant	3,985	10/14/2021
	Lease - Tenant	8,011	10/18/2021
	Lease - Tenant	2,135	4/14/2022
	Lease - Tenant	7,623	3/15/2022
	Lease - Tenant	4,100	10/18/2021
	Lease - Tenant	2,709	3/2/2022
	Lease - Tenant	8,454	2/20/2023
	Lease - Tenant	4,248	12/22/2021
	Lease - Tenant	8,289	3/2/2022
	Lease - Tenant	3,555	10/18/2021

Agency	Deal Type	Location	SF	Date Closed
	Lease - Tenant		6,777	9/19/2022
	Lease - Tenant		4,795	5/25/2022
	Lease - Tenant		6,155	12/2/2021
	Lease - Tenant		2,200	12/29/2021
	Lease - Tenant		11,290	4/25/2022
	Lease - Tenant		2,047	2/28/2022
	Lease - Tenant		4,378	6/21/2023
	Lease - Tenant		16,006	1/13/2023
	Lease - Tenant		10,295	1/6/2022
	Lease - Tenant		4,289	12/22/2021
	Lease - Tenant		4,753	2/9/2022
	Lease - Tenant		6,236	11/24/2022
	Lease - Tenant		3,394	11/20/2023
	Lease - Tenant		4,844	11/2/2022
	Lease - Tenant		4,000	9/1/2022
	Lease - Tenant		15,063	9/14/2022
	Lease - Tenant		231930	5/25/2022
	Lease - Tenant		4,005	2/6/2023
	Lease - Tenant		3,000	4/14/2022
	Lease - Tenant		2,945	7/18/2022
	Lease - Tenant		2,943	7/6/2022
	Lease - Tenant		4,315	5/16/2022
	Lease - Tenant		2,059	8/30/2022
	Lease - Tenant		499	5/25/2022
	Lease - Tenant		9,000	5/24/2022
	Lease - Tenant		7,594	7/15/2022
	Lease - Tenant		8,545	9/20/2022
	Lease - Tenant		8,486	8/22/2022
	Lease - Tenant		13,987	9/1/2022
	Lease - Tenant		2,681	9/27/2022
	Lease - Tenant		17,072	3/27/2023
	Lease - Tenant		3,639	9/19/2022
	Lease - Tenant		4,100	9/19/2022
	Lease - Tenant		2,600	11/18/2022
	Lease - Tenant		29,877	9/13/2022
	Lease - Tenant		21,047	11/24/2022
	Lease - Tenant		12,739	5/17/2023
	Lease - Tenant		18,454	4/6/2023
	Lease - Tenant		36,514	11/9/2022
	Lease - Tenant		11,948	11/21/2022
	Lease - Tenant		7,989	3/27/2023
	Lease - Tenant		10,486	2/10/2023

Agency	Deal Type	Location	SF	Date Closed
	Lease - Tenant		3,000	\$354,390.00 2/28/23
	Lease - Tenant		4,999	\$1,507,881.80 5/17/23
	Lease - Tenant		4,817	\$503,954.76 3/27/23
	Lease - Tenant		1,936	\$180,390.00 3/27/23
	Lease - Tenant		9,520	\$1,612,688.04 3/22/23
	Lease - Tenant		8,372	\$276,276.00 5/17/23
	Lease - Tenant		31,425	\$15,283,863.12 8/1/23
	Lease - Tenant		10,044	\$1,493,743.68 4/20/23
	Lease - Tenant		4,800	\$811,005.00 6/21/23
	Lease - Tenant		4,000	\$195,000.00 6/21/23
	Lease - Tenant		18,178	\$4,160,402.40 8/1/23
	Lease - Tenant		8,109	\$2,221,866.24 9/12/23
	Lease - Tenant		36,514	\$8,085,660.36 11/18/24
	Lease - Tenant	s	2,150	\$261,311.04 6/21/23
	Lease - Tenant		2,000	\$160,860.12 7/27/23
	Lease - Tenant		4,999	\$460,307.88 9/21/23
	Lease - Tenant		8,704	\$199,466.63 7/6/23
	Lease - Tenant		4,999	\$913,949.16 9/7/23
	Lease - Tenant	le	2,178	\$373,091.52 12/13/23
	Lease - Tenant		1,255	\$204,878.76 11/20/23
	Lease - Tenant		4,999	\$1,581,278.88 9/12/23
	Lease - Tenant		5,950	\$1,385,993.04 3/6/24
	Lease - Tenant		11,188	\$2,072,354.60 10/1/23
	Lease - Tenant		7,097	\$1,082,789.28 11/5/24
	Lease - Tenant		10,800	\$7,386,012.00 5/1/24
	Lease - Tenant		7,700	\$937,475.16 2/7/24
	Lease - Tenant		13,613	\$2,722,600.20 12/29/23
	Lease - Tenant		3,526	\$421,251.12 10/30/23
	Lease - Tenant		2,700	\$284,823.00 11/20/23
	Lease - Tenant		2,200	\$58,431.96 11/28/23
	Lease - Tenant		3,525	\$71,381.28 12/13/23
	Lease - Tenant		2,842	\$179,700.00 1/11/24
	Lease - Tenant		20,950	\$4,164,775.68 1/24/24
	Lease - Tenant		9,702	\$906,166.92 12/13/23
	Lease - Tenant		800	\$97,200.00 7/23/24
	Lease - Tenant		2,909	\$185,797.92 4/25/24
	Lease - Tenant		3,500	\$528,010.08 4/29/24
	Lease - Tenant		5,456	\$131,544.12 1/31/24
	Lease - Tenant		4,999	\$430,713.84 3/6/24
	Lease - Tenant		2,400	\$726,432.00 2/7/24
	Lease - Tenant		4,999	\$491,901.60 7/24/24



Agency	Deal Type	Location	SF	Date Closed	
	Lease - Tenant		78	\$99,293.04	3/6/24
	Lease - Tenant		9	\$45,033.96	3/7/24
	Lease - Tenant		0	\$319,687.50	4/25/24
	Lease - Tenant		75	\$6,377,250.60	5/1/24
	Lease - Tenant		0	\$4,291,377.96	5/20/24
	Lease - Tenant		0	\$979,902.00	4/19/24
	Lease - Tenant		22	\$202,398.00	4/26/24
	Lease - Tenant		9	\$811,408.68	5/13/24
	Lease - Tenant		70	\$93,638.76	9/5/24
	Lease - Tenant		0	\$3,397,920.00	10/30/24
	Lease - Tenant		21	\$3,531,068.16	2/4/25
	Lease - Tenant		9	\$287,242.44	10/24/24
	Lease - Tenant		9	\$771,295.80	11/22/24
	Lease - Tenant		39	\$4,107,943.80	2/10/25
	Lease - Tenant		74	\$798,522.72	11/5/24
	Lease - Tenant		9	\$1,411,617.72	10/29/24
	Lease - Tenant		70	\$2,530,489.80	11/4/24
	Lease - Tenant		25	\$3,967,944.96	11/18/24
	Lease - Tenant		4	\$154,291.20	11/27/24
	Lease - Tenant		0	\$318,240.00	11/6/24
	Sale - Buyer		63	\$5,200,000.00	1/4/21
	Sale - Buyer		4	\$4,900,000.00	2/16/24
	Sale - Seller		0	\$8,750,000.00	9/3/24
	Sale - Seller		0	\$259,000.00	10/11/24
	Sale - Seller		0	\$630,000.00	12/13/23
	Sale - Seller		0	\$62,000,000.00	6/1/23
	Sale - Seller		0	\$135,822.00	5/1/23
	Sale - Seller		0	\$637,713.00	10/1/23

# CBRE Property Management (PM) Hurricane Preparedness

## National Emergency Operation Center (NEOC)

CBRE has developed an industry-leading National Emergency Operation Center (NEOC) located in Dallas, Texas, dedicated to property recovery. The NEOC was organized to assist local markets or Local Emergency Operation Centers (LEOCs) in the event of a major natural disaster. The center operates 24 hours a day, seven days a week in order to coordinate situational awareness, employee accountability, communication and critical resource response.

The NEOC also leverages internal resources such as Risk, Communications, HR, legal, BCP, HSSE and Tech Services. It is prepared to quickly deploy resources such as personnel, national vendors, supplies and security to any location in the United States.

CBRE has multiple sets of National Emergency Response Trailers (ERTs) located in Florida, readily available to support our teams. Each set consists of a mobile command post, equipment trailer and 1,000-gallon diesel tank trailer. Additional features include:

- Fully self-contained response trailers have generators and battery backup and can provide living and working quarters for up to four people.
- Satellite phone and TV provide communication and situational awareness.
- 12-volt charging bank allows charging of multiple cell phones and two-way radios.
- Mobile office with plan review table, printer, etc. available for on-site response planning sessions.
- Hand-picked tools and supplies that account for the most potential needs during and after an event.

## Emergency Procedures Manual

Our firm has developed an emergency procedures manual. This document can be used as the foundation to develop a site-specific manual for the City's properties. To reflect today's environment, CBRE's Emergency Procedures Manual has been updated adding new sections such as recommended procedures for bio-hazards and a new risk assessment tool.





# CBRE Florida PM Response to Hurricanes



## Inspection

All buildings monitored with Inspections occurring within 24-hours after storm.



## Data & Reporting

CBRE Employee Welfare Check-In Program engaged for all 364 employees around the state of Florida to report in & accounted for properties within 24 hours of the storm.



## Recovery

Streamlined recovery process. By way of example, 140 properties that were without power or damaged during recent hurricane were open for business within 48-hours (92% of our portfolio at the time)

## POST STORM PLANNING & PREP

## FUEL, EQUIPMENT & RESOURCES MOBILIZED



## Fuel Truck

Pumper truck with 7,500 gallons of diesel fuel are driven into Florida from Birmingham, AL.



## Dispatch Establishment

CBRE has established an out-of-state command center staffed by 2 for monitoring & dispatching resources throughout the state.

During storms a staging area for emergency equipment in Orlando is established to serve as a central location with access to all parts of Florida.



## Diesel Tank

10,000 gallon diesel tank delivered & stationed in Orlando.

## Utility vehicles

2 trucks available with utility trailers including 3x100 gallon diesel tanks, 1x 90 gallon gasoline tank, tools & supplies, food & water.







## CONTACTS:

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Managing Director

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tommie.reilly@cbre.com

**Lee Ann Korst**

Senior Vice President  
& Southeast Regional Manager

+1 850 251 9319

leeann.korst@cbre.com

**Tom Watson**

Senior Vice President

+1 850 527 3524

thomas@cbre.com

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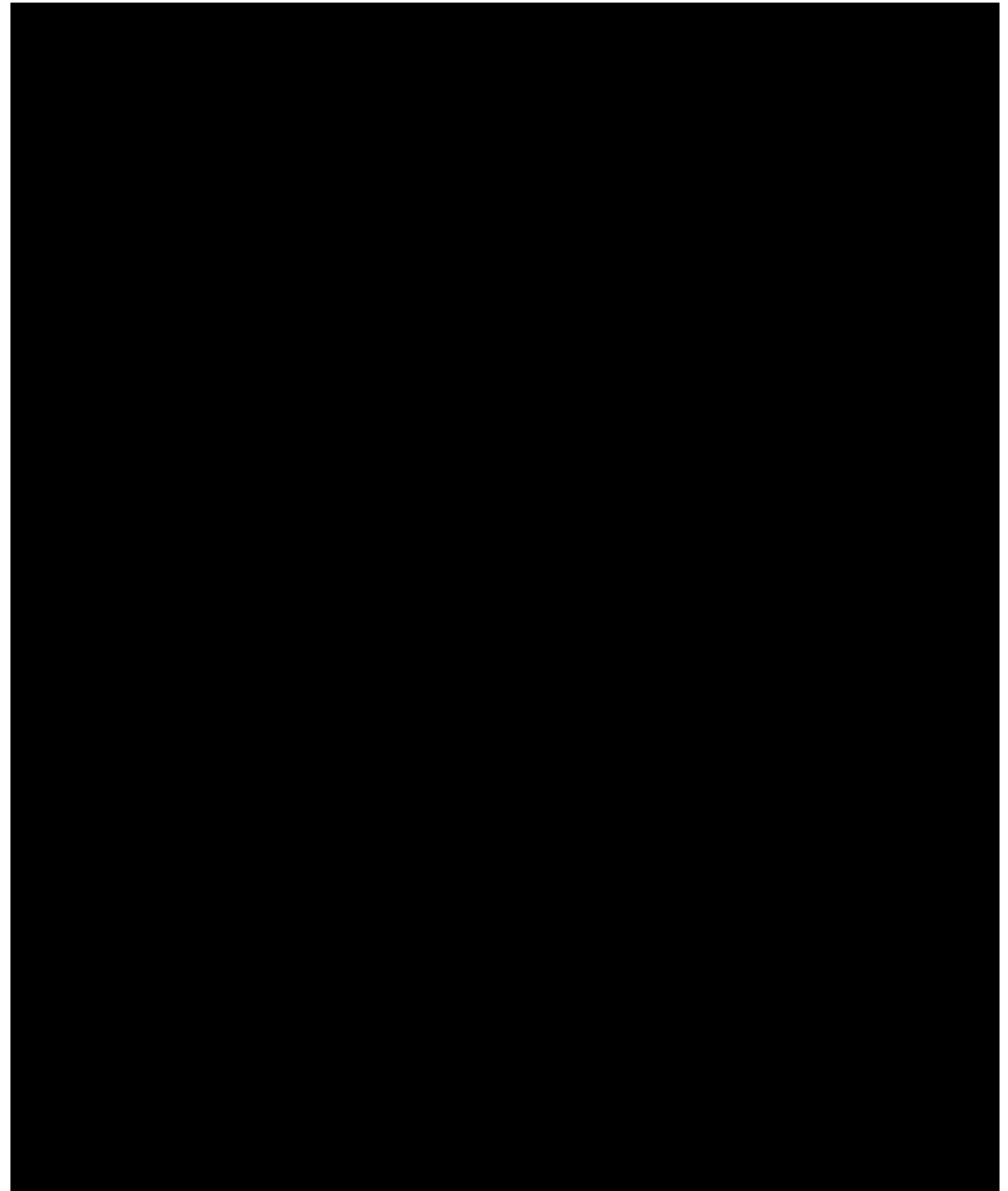


Key Team  
Member  
Resumes

**CBRE**



# Appendix







**Tom Watson**  
Senior Vice President  
Advisory & Transaction Services  
T: +1 850 527 3524  
thomas.watson@cbre.com

## Clients Represented

- State of Florida
- Accenture
- Booz Allen Hamilton
- BOTE
- Caliber Home Loans
- Casto Properties
- DR Horton
- EBSCO Industries
- FL Homebuilder's Assoc.
- Gramercy Property Trust
- Imperium Blue
- Johns Hopkins University
- Johnson Controls
- JPB Partners
- Lululemon
- McKesson
- OBP Partners
- Oceaneering Int'l
- Pacifica Properties
- St. Joe Company
- Taziki's Mediterranean Cafe
- Trustmark Bank
- Yamaha Corp

## Education

- Bachelor of Science in Finance from the Florida State University

## Experience

In December 2015, Tom Watson opened CBRE's Northwest Florida office in Miramar Beach, which has since grown to four sales associates and over \$100 million in annual transaction volume.

Mr. Watson represents investors, landlords and occupiers, and land owners in both the sale and leasing of commercial real estate properties across the Northwest Florida market, spanning from Tallahassee to Pensacola.

With 30 years of commercial real estate experience in the Southeastern US, and including a background in banking, research and consulting, Mr. Watson is established as a knowledgeable and trusted advisor. Having relocated to Florida's Panhandle in 2001, his career has focused on serving a diverse set of clients, including institutional portfolio owners, local families with generational real estate holdings, small business owners and Fortune 500 occupiers of space.

Mr. Watson's expertise in a variety of commercial real estate product types, including retail, office, industrial, land and other specialty practice areas provides a broad perspective on economic and market trends, providing tremendous value to his clients in support of their critical decision-making. Over the course of his career, he has been involved in over 2 million square feet of lease and sales transactions and many thousands of acres of land development and sales, advising on over \$1 billion in transaction value.

## Significant Projects/Transactions

Client	Address	Type	Size (SF)
Pier Park North	Panama City Beach, FL	Landlord Rep/Lease	350,000
Shoppes at Paradise Key	Destin, FL	Landlord Rep/Lease	265,000
GKN Aerospace - Venture Crossing Industrial	Panama City, FL	Lease	140,000
Gulf Place	Santa Rosa Beach, FL	Investment Sale	23,000 SF Retail Center - \$12M
Oceaneering Int'l	Port of Panama City, FL	Occupier Rep	54,000
Washington Crossing	Ebro, FL	Entitlement/ Development and Disposition	630 AC - \$15.2M
Crestview Ridge	Okaloosa County, FL	Entitlement/ Development and Disposition	500 AC - \$9.3M

## Professional Affiliations

- Licensed Real Estate Sales Associate, State of Florida
- Member: ICSC, NAIOP
- Board of Directors (Past & Present)
  - Florida's Great Northwest
  - Children's Volunteer Health Network | Chair of Finance Committee
  - The Seaside School - Chair of Governance Committee
  - Cultural Arts Alliance of Walton County - Vice President
  - Seaside Repertory Theatre Company
- Lakeplace at Grayton HOA - President



**Elizabeth Forsythe**  
**Vice President**  
**Advisory & Transaction Services**  
T: +1 850 585 5290  
elizabeth.forsythe@cbre.com

### Clients Represented

- Ascension Sacred Heart
- Booz Allen Hamilton
- BurgerFi
- CASTO Properties
- Clean Juice
- Club Champion
- Compass Real Estate
- Crumbl Cookies
- EBSCO Industries
- EG America – Tom Thumb
- Ferguson Enterprises
- GKN Aerospace
- Island Fin Poke
- Jeremiah's Italian Ice
- johnnie-O
- Mariner Finance
- Move-it Storage
- Pacifica Real Estate
- Rock & Roll Sushi
- Skechers
- State of Florida
- The St. Joe Company

### Experience

With over 18 years and a proven track record in the commercial real estate industry, Elizabeth Forsythe, joined the Northwest Florida CBRE office in Fall 2019. Prior to that, Elizabeth served as Asset Manager for The St. Joe Company, overseeing its broad and diverse commercial assets. In this capacity, Elizabeth served as the in-house leasing representative for its retail, industrial and office opportunities and procured build-to-suit and strategic joint venture partners for the company's commercial land development projects across the Florida panhandle. Possessing acute knowledge of the Northwest Florida market, spanning from Tallahassee to Pensacola, and encompassing all aspects of the commercial real estate industry, Elizabeth is uniquely qualified to serve her clients, regardless of the type of transaction.

Elizabeth is a proud graduate of the University of Georgia, and upon graduating immediately began her career in commercial real estate in Atlanta, GA, before relocating to Northwest Florida in 2011. While in Atlanta, she served as landlord leasing representative for multiple Class-A office buildings, responsible for leasing over two million square feet of office space.

### Significant Assignments

- Greenway Station – 26,000 SF, Santa Rosa Beach, FL (retail leasing)
- Alys Beach Town Center – 100,000 SF, Alys Beach, FL (retail leasing)
- Laguna Beach Retreat – Main Campus (9.3 acres) and Cottage Campus (4.5 acres) (disposition)
- Beckrich Office Park – 60,000 SF, Panama City Beach, FL (office leasing)
- St. Joe Company - Town Center Community Portfolio: WaterColor Town Center (Watercolor, FL), Southwood Town Center (Tallahassee, FL), WaterSound Town Center (WaterSound, FL), Windmark Village Center (Windmark, FL)

### Professional Affiliations and Education

- Licensed Real Estate Sales Associate, State of Florida
- Seaside Schools, Inc. Board of Directors (2017-2020; serving as Chairwoman 2019-2020)

### Education

- Bachelor degree in Business Administration/Marketing, University of Georgia





**Samantha Herrera**  
**Associate**  
**Advisory & Transaction Services**  
**T: +1 714 227 3829**  
**sam.herrera@cbre.com**

### Clients Represented

- Lennar
- Los Angeles Mission
- Ben E Keith
- Campbell's Snack
- Cambridge College
- CDR Maguire
- CHCS Services Inc.
- Clarion Partners
- Ferguson
- GenesisCare
- Hilltop Holdings
- LabCorp
- National Seating & Mobility
- PrimeLending
- Radiology Partners
- Rockwood Capital
- Smith+Nephew

### Experience

Sam Herrera represents investors, landlords and occupiers in both the sale and leasing of commercial real estate properties across the Northwest Florida market, spanning from Tallahassee to Pensacola. To date, her team has been involved in more than 1 million square feet of leasing and sales and totaling over \$100M in transaction volume per year.

Bilingual in English and Spanish, Ms. Herrera uses her resources within CBRE to translate and work with Spanish-speaking landlords and tenants in the market.

Over the past decade, Ms. Herrera has advised clients through all aspects of leasing and sales transactions. Acting as a consultant for her clients, she has prepared BOVs (broker opinion of value) for various transactions and property types, including land acquisitions, retail, and mental health centers.

As an active participant within the Northwest Florida market, she is involved with Greater Fort Walton Beach Chamber of Commerce and United Way's Emerging Leaders.

Prior to joining CBRE NW Florida, Ms. Herrera represented landlords in the Greater Los Angeles area to oversee a diverse portfolio of over 4.5 million square. Additionally, she represented tenants throughout California, totaling over 100,000 square feet of transactions.

### Professional Affiliations and Education

- Greater Fort Walton Beach (Florida) Chamber of Commerce
- United Way, Emerging Leaders
- CBRE HOLA Member & Virtual Chapter Lead
- CBRE Women's Network

### Education

- Bachelor degree, University of Oregon





**Marc Scaffe**  
**Managing Director**  
**CBRE Property Management**  
T: +1 813 273 8480  
marc.scaffe@cbre.com

## Experience

Marc Scaffe currently serves as a Director of Property Management for the Tampa, Jacksonville and Panhandle markets and provides statewide oversight for new Retail Management and Agency Leasing pursuits. Marc has over thirty years of experience in commercial real estate acquisition, development, finance, accounting, receiverships, third-party property management and leasing, brokerage and the disposition of assets.

Mr. Scaffe has successfully developed/managed over twenty million square feet of retail shopping centers, Class A office buildings, industrial buildings, multi-family, drug store and single tenant facilities for numerous national commercial real estate firms. He has served as the Court Appointed Receiver for more than 1.5/MSF of commercial property. He has an extensive background in securing senior and mezzanine construction/permanent financing for all commercial real estate product types and is well versed in handling complex loan workouts. Mr. Scaffe has successfully staffed, trained and managed numerous property management, leasing, accounting, finance and administrative operations for national and regional commercial real estate firms.

Prior to joining CBRE, Mr. Scaffe held senior level management positions with national and regional commercial real estate firms, including The Rouse Company, Lincoln Property Company, The Hogan Group and Moor + South. Additionally, supplementing a multi-faceted real estate career, Mr. Scaffe has also served as Vice President of Commercial Lending with BankAtlantic, a Florida-based lending institution.

## Professional Affiliations and Education

- The International Council of Shopping Centers
- NAIOP
- The Chamber of Commerce

## Education

- Hillsborough College, Degree in Business Administration
- Florida Real Estate License

## SUBCONTRACTOR



**Cameron Cauley**  
**President**  
**NAI Pensacola Property Management**  
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M: +1 850 291 3341  
ccauley@naipensacola.com

## Scope of Service Experience

Specializes in the sales and leasing of commercial investment, office, retail, land and industrial properties.

## Property Management.

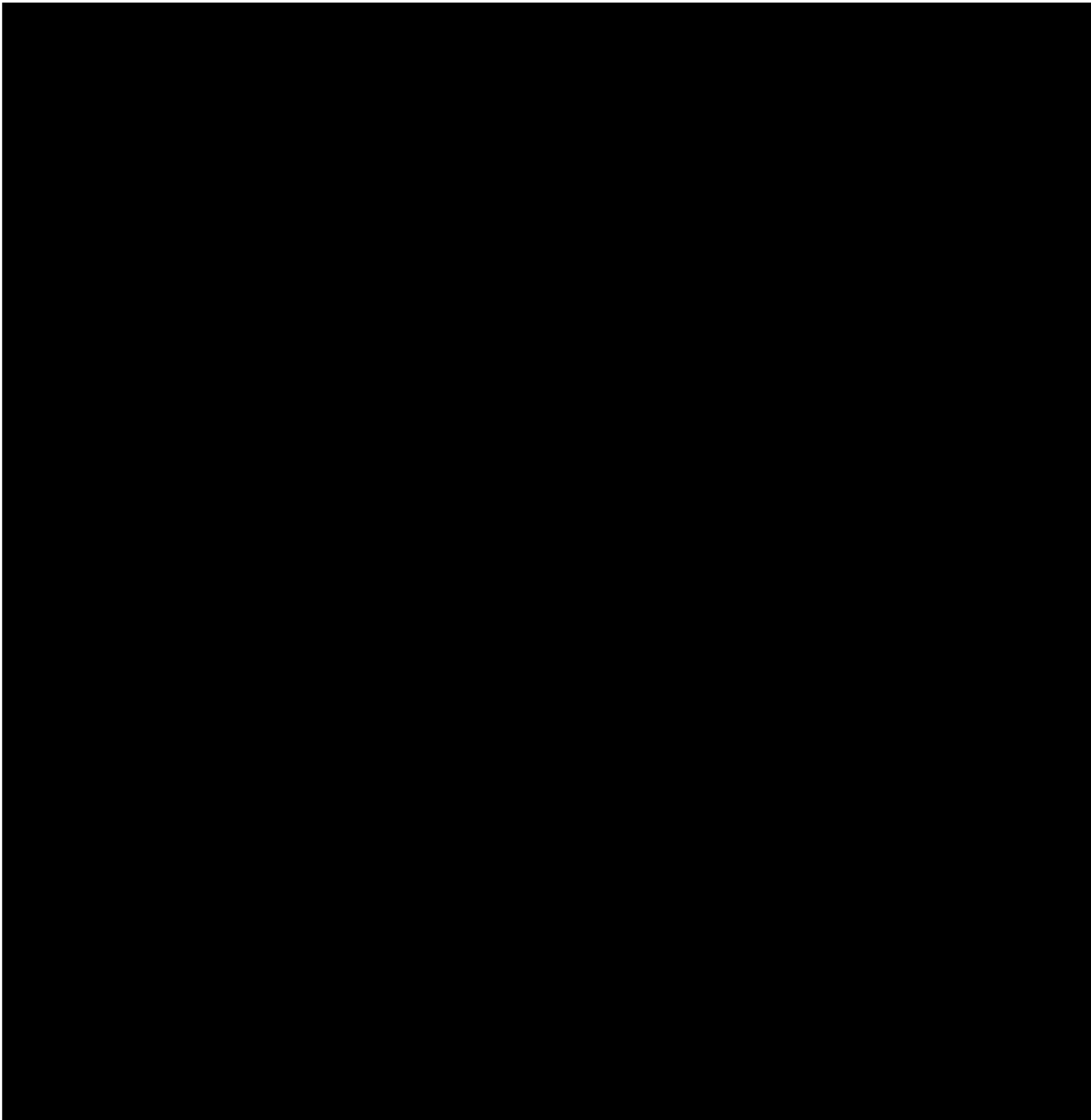
Cameron is the President of the Property Management division of NAI Pensacola, under Cameron's leadership and direction the company manages over 1 million square feet of office, industrial, and multi-tenant retail space. Cameron is committed to providing a pleasant leasing experience, ensuring tenant satisfaction and retention. He applies an advanced skill set to the administration, oversight and leasing, adding value to all managed property in any asset class, resulting in a maximum return for owners upon the sale of their property.

## Background & Experience

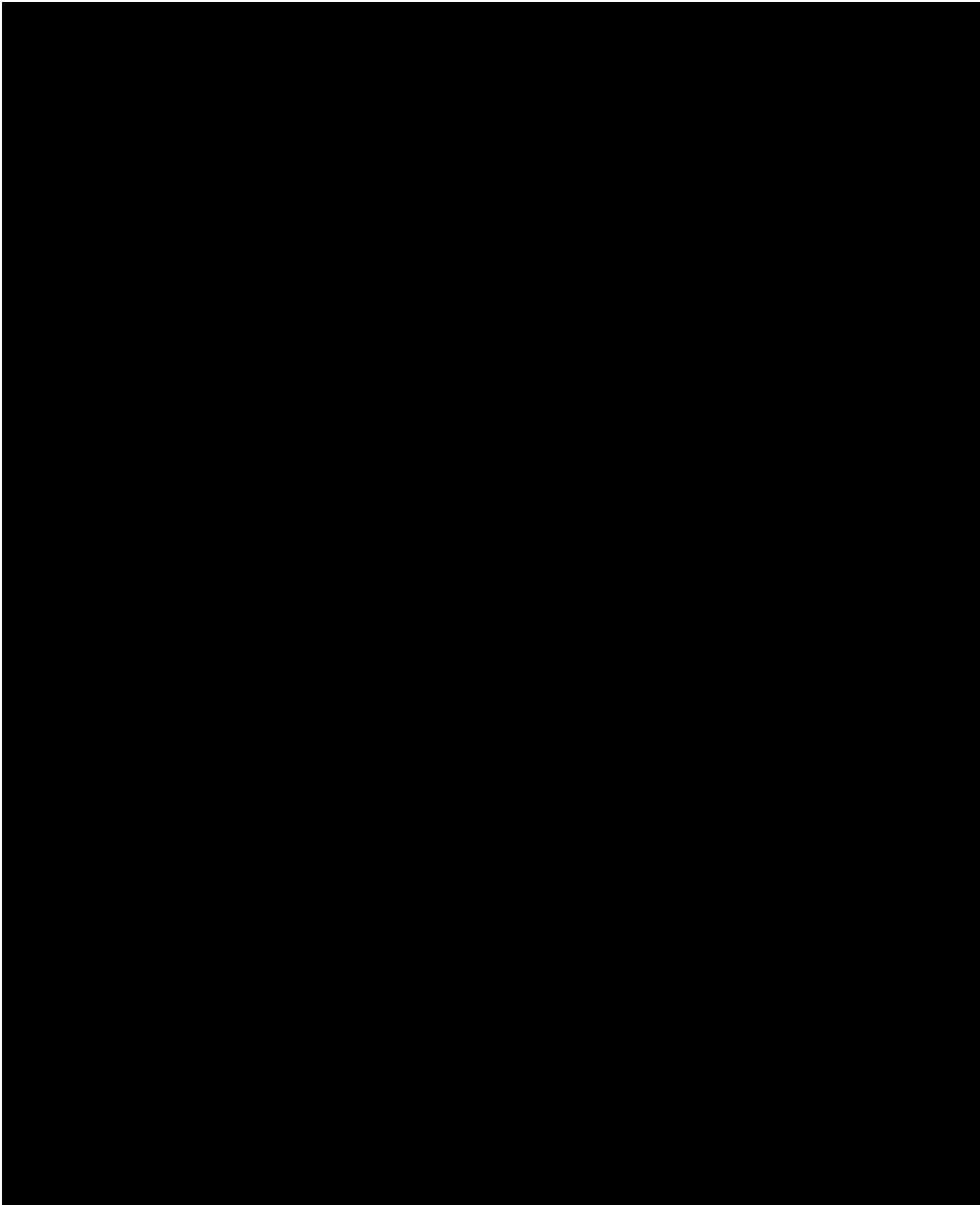
Cameron Cauley brings extensive experience and a creative mind-set as a licensed commercial real estate agent at NAI Pensacola. Professionalism, market knowledge, a strong work ethic, along with determination and dedication are characteristics that Cameron bases his career on. Cameron specializes in applying his expertise and market knowledge to broker commercial investment, office, industrial, retail and multifamily properties that consistently exceed the investment goals of his clients. He stays abreast of the latest trends and key market intelligence which directly impacts his client's financial success. By applying these professional philosophies, he has earned a reputation for being a skilled negotiator with refined negotiating and sales tactics and is a solid top producer in the region. Cameron is inventive, resourceful and displays a distinct knack for thinking outside of the box to put deals together that achieve high returns for his clients.

## Clients Represented

- |                                   |                              |                                  |
|-----------------------------------|------------------------------|----------------------------------|
| - Terramore Development           | - Rimrock Development        | - SunTrust Bank                  |
| - Finger Enterprises              | - Big Top Investment Group   | - Dogwood Square Shopping Center |
| - Dr. Randall Brown               | - FDC Holdings               | - City of Milton                 |
| - Loftin Properties               | - The First National Banking | - C&H Ventures                   |
| - Ahamad, Ruman, & Merman         | - Association                | - Blue Ridge Summit              |
| - JRMA Investments                | - Lemarc Properties          | - Goodson Consulting             |
| - AIM Behavioral                  | - North Hill Developers      | - Steker LLC                     |
| - RaceTrac, Inc.                  | - NRMF, LLC                  | - Elks Lodge                     |
| - Elavatorski                     | - Davis and Gallagher        | - Grant, Grant, Seals            |
| - Orpin and Orpin                 | - Navarre Square             | - Litchfield Pear Orchard        |
| - Horticulture Investment Service | - Quantum Telecommunications | - Pensco Trust                   |









**Tommie Reilly**  
**Managing Director**  
**CBRE Jacksonville/**  
**Northwest Florida**  
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tommie.reilly@cbre.com

## Experience

As Managing Director and Market Leader for CBRE's Jacksonville and Northwest Florida offices, Tommie Reilly oversees business operations and drives the office's growth strategy for all Advisory Services lines of business, including leasing, sales, valuations, project management and property management.

Ms. Reilly partners with CBRE professionals to solve real estate and business challenges for commercial real estate clients. She manages a wide variety of critical business functions including strategic business development initiatives, pursuit leadership, broker business plans, recruiting, and strategic team formation.

She joined CBRE in 2017 as a Sales Manager, supporting CBRE's North and Central Florida markets before being promoted to Sales Director in March 2020. During her time with CBRE, Ms. Reilly has played a pivotal role in strategy for pursuits of the North Florida CBRE brokerage professionals to increase market share and client satisfaction. She has developed a local employee engagement plan, training programs, internship programs, and guided strategic objectives.

In addition to her local leadership duties in Jacksonville, Ms. Reilly has acted as a delegate for CBRE's Women's Network since 2016. In this role, she champions the pillars of Advocacy, Mentorship and Growth for CBRE professionals across Florida. In 2021, Ms. Reilly was elected the Co-Chair of CBRE's Women's Network in Florida, a position in which she still serves. She spearheads a robust leadership team supported by field delegates and committees to lead local programs for more than 235 members across the state. Ms. Reilly also serves on a local committee in partnership with the Melanoma Research Foundation to raise awareness and funding for research grants at Moffit.

Prior to joining CBRE, Ms. Reilly gained more than 10 years of leadership experience in both sales and the mortgage banking industry.

## Professional Affiliations and Education

- NAIOP
- Urban Land Institute
- Jacksonville Chamber Trustee

## Education

- Bachelor of Science in Business Administration from the University of Missouri – Columbia
- Bachelor of Arts in International Relations from the University of Missouri – Columbia
- Master of Business Administration from the University of North Florida

# Fee Proposal

## Acquisition Services

In the event the City seeks to purchase property (either raw land or existing building(s), CBRE will first pursue payment of those fees from the seller at a market rate, as brokerage fees are typically paid by the selling entity. In the event that land the City wishes to acquire is unlisted, or that a commission for the buyer's agent is not included in the seller's representation agreement with their agent/ broker, CBRE would seek the following compensation from the City on a cumulative basis.

PURCHASE PRICE	COMMISSION PAID TO CBRE
First \$0 - \$2 M	
Next \$2 M - \$7 M	
Next \$7 M - \$12M	
Next \$12M - \$20M	
Next \$20M and up	

For example, on a \$12,000,000 purchase, CBRE's compensation would be calculated as follows:

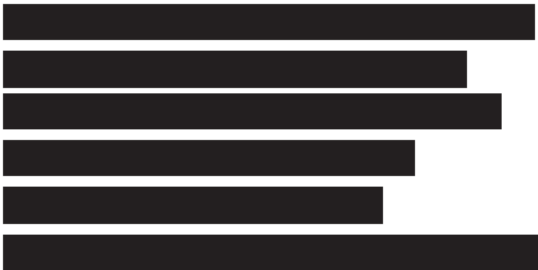


## Disposition Services

In the event the City seeks to sell surplus property on a fee simple basis, CBRE's compensation will be as below, by the City to CBRE only. Any outside brokers / buyer representation will be responsible for seeking commissions from their principals, unless the City believes it to be prudent to offer a substantial outside representation fee at its discretion. Commissions will be charged per transaction on a cumulative basis.



SALE PRICE	COMMISSION PAID TO CBRE
First \$0 - \$2 M	
Next \$2 M - \$7 M	
Next \$7 M - \$12M	
Next \$12M - \$20M	
Next \$20M and up	





P3/Development Advisory Services

In the event the City would like CBRE to represent it in a Public-Private Partnership, CBRE’s compensation will take the

[Redacted]

[Redacted]

[Redacted]

[Redacted]	
[Redacted]	
[Redacted]	
[Redacted]	
[Redacted]	
[Redacted]	
[Redacted]	
[Redacted]	

[Redacted]

## Leasing Services

Lease services and corresponding commissions vary depending on the role of the City in the transaction. We have priced multiple scenarios for your convenience:

### CITY AS LANDLORD

In the event of a lease of owned property, CBRE shall be paid a fair market commission by the City from lease proceeds generated as a result of such lease. Fair market commission for representation is equal to [REDACTED] if a broker is representing the lessee, with [REDACTED] paid to CBRE and [REDACTED] paid to the lessee's broker. In the event the lease is completed without a cooperating broker, the commission is reduced to [REDACTED] fee to CBRE.

### CITY AS A TENANT

In the event CBRE represents the City as a tenant in a lease transaction, CBRE would seek a market commission of approximately [REDACTED], payable by the third party landlord.

### LEASING SUMMARY

SERVICE	TOTAL FEE	FEE TO CBRE	FEE TO OUTSIDE BROKER	PAID BY
CBRE representing City as Landlord (with outside broker)	[REDACTED]			
CBRE representing City as Landlord (no outside broker)				
Representing City as Tenant				

In the event that our Agreement or any particular engagement to provide the Services ends without a signed transaction, within 30 days of that ending, CBRE shall provide the City with a list of all parties with whom CBRE was engaged in active negotiations with respect to leases or other transactions for which fees could be earned under this Agreement. If within one year after such expiration or termination date, the City enters into any agreement of sale, lease, sublease or other written agreement with a party on such list for which a fee would have been earned hereunder, CBRE shall earn the fee provided for under this Agreement to the same extent as if the Services had not expired or terminated. Upon the expiration of the one year period, CBRE may present to the City for its consideration an extension of the fee protection period for any existing transactions which remain active and imminent. The City shall not be obligated to extend such period, but the Parties shall negotiate in good faith a fair compensation arrangement for the work performed by CBRE (or its Subagents) prior to termination. This paragraph shall survive the termination or expiration of our Agreement.