

July 27, 2022

Via electronic submission

Jefferson Parish Purchasing Department
General Government Building
200 Derbigny Street, Suite 4400
Gretna, LA 70053
Attn: Donna Evans

RE: SOQ No. 22-040
Title and Closing Services

Dear Ms. Evans:

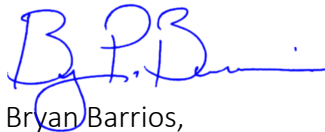
Archon Information Systems, L.L.C. d/b/a CivicSource (CivicSource) respectfully submits this proposal in response to SOQ No. 22-040 relative to Title and Closing Services in support of the Parish's sale of adjudicated property.

In support of our proposal please find attached:

1. General Professional Services Questionnaire for CivicSource
2. Pricing Schedule
3. General Professional Services Questionnaire for U.S. National Title Insurance Company (subcontractor)
4. General Professional Services Questionnaire for Dynamite Abstracting (subcontractor)
5. General Professional Services Questionnaire for Kimberly Savage (subcontractor)
6. General Professional Services Questionnaire for Kristi Randall (subcontractor)
7. Resumes for all professionals who shall be engaged on this project

Thank you for your consideration and do not hesitate to contact us if we can provide any additional information.

Respectfully submitted,



Bryan Barrios,
Chief Executive Officer

BB/ss

Enclosure

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

SOQ 22-040 Title and Closing Services
Resolution No. 139993

B. Firm Name & Address:

Archon Information Systems, LLC
d/b/a CivicSource
701 Papworth Ave.
Suite 103
Metairie, LA 70005

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Bryan Barrios
Chief Executive Officer
bryan@civicsource.com
(504) 214-8101

D. Address of principal office where Project work will be performed:

CivicSource
701 Papworth Ave.
Suite 103
Metairie, LA 70005

E. Is this submittal by a JOINT-VENTURE? Please check: YES: _____ NO: X

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

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

1.

2.

General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES _____ NO _____		
H. List all subcontractors anticipated for this Project. Please note that <u>all subcontractors must submit a fully completed copy of this questionnaire</u>, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.		
Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. U.S. National Title Insurance Co. 232 Market Street Ste. 232 Flowood, MS 39203	Title underwriter on Louisiana adjudicated properties for CivicSource since 2016	Yes
2. Dynamite Abstract 2708 Acadiana Trace Marrero, LA 70072	30-year title searches for both residential and commercial properties	Yes
3. Kristi Randall 869 West 2700 South Syracuse, UT 84075	Genealogical research to procure living heir information of deceased parties	Yes
4. Kim Savage 951 West 2800 South Syracuse, UT 84075	Genealogical research to procure living heir information of deceased parties	Yes
5.		

General Professional Services Questionnaire

I. Please specify the total number of support personnel that may assist in the completion of this Project: <u>14</u>
J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.
PROFESSIONAL NO. 1
Name & Title:
Bryan Barrios, CEO
Name of Firm with which associated:
CivicSource
Description of job responsibilities:
Chief Executive Officer As CEO, Bryan Barrios oversees the strategic focus of the organization.
Years' experience with this Firm:
14 years, 7 months
Education: Degree(s)/Year/Specialization:
1995, Nicholls University, B.A. Business Administration and History (<i>cum laude</i>) 3; ; ; . "Nq { qn "Wp kxgtukv { "Uej qqn'qh'Ncy . "Lwtku" F qevqtcvg'uwf lgu 4233. "Nchqwtelj g "Rctkuj "Uj g tkhu" Vtcklpi "Cecf go { . "RQUUW0E ertification, Scholastic Award
Other experience and qualifications relevant to the proposed Project:
Bryan Barrios is an entrepreneur who has focused his career on enabling local governments to efficiently restore property tax revenue to their communities. Barrios formed the Tax Collection Division of Scheuermann & Jones Law Offices in 2001, serving as Director until 2005, where he collected over \$10.8 million in unbudgeted revenue for New Orleans' Bureau of Revenue. Thereafter, he formed Strategic Alliance Partners L.L.C., serving as its Executive Director until 2007, where he collected over \$80 million in delinquent ad valorem taxes for New Orleans' Bureau of Treasury. In 2008, he formed CivicSource and continues to serve as its Chief Executive Officer, where he has handled over \$1.13 billion in property auctions and tax sales and recovered over \$911 million on behalf of clients across the country. Barrios has drafted or amended over a dozen pieces of state and local legislation, which has helped shape property tax law in Louisiana.

General Professional Services Questionnaire

PROFESSIONAL NO. 2
Name & Title:
Dan Rebeor, COO
Name of Firm with which associated:
CivicSource
Description of job responsibilities:
Chief Operating Officer As COO, Dan Rebeor is responsible for the daily operation of the organization.
Years' experience with this Firm:
1 year, 7 months
Education: Degree(s)/Year/Specialization:
1989, Bachelor of Science, State University of New York at Fredonia 1994, Juris Doctorate, University of Dayton College of Law - admitted to the Ohio State bar 2006, Executive Education Program, University of North Carolina at Chapel Hill 2018, Admitted to the Florida State bar as Authorized House Counsel
Other experience and qualifications relevant to the proposed Project:
Prior to joining CivicSource, Dan Rebeor served in a number of executive operations and general counsel roles for some of the largest real estate investing and management firms in the United States. Under his leadership and counsel, those companies experienced growth, expansion, and efficiency.

General Professional Services Questionnaire

PROFESSIONAL NO. 3
Name & Title:
Ann Marie Sledge, Title Attorney Manager
Name of Firm with which associated:
CivicSource
Description of job responsibilities:
Daily management of a team of attorneys and title research experts as they complete multiple types of research related to title obtained through tax delinquency actions, and ensure legal compliance with notice requirements.
Years' experience with this Firm:
4
Education: Degree(s)/Year/Specialization:
2012, B.S. Psychology from Louisiana Tech University 2016, J.D. and Certificate in Civil Law Studies from Mississippi College School of Law
Other experience and qualifications relevant to the proposed Project:
Prior to joining CivicSource, AM Sledge worked with a law firm to establish policies and procedures required for compliance with the American Land and Title Association.

General Professional Services Questionnaire

PROFESSIONAL NO. 4
Name & Title:
Lauren Ryan, Senior Title Attorney
Name of Firm with which associated:
CivicSource
Description of job responsibilities:
Ryan monitors genealogy vendors for quality assurance, and ensures each property complies with US National Title Insurance guidelines for insurability. In addition, she reviews and conducts research for property and individuals.
Years' experience with this Firm:
5
Education: Degree(s)/Year/Specialization:
2010 B.S. in Accounting from Louisiana State University 2013 J.D./D.C.L. (Doctor of Comparative Law) from Louisiana State University
Other experience and qualifications relevant to the proposed Project:
Prior to joining CivicSource, Lauren Ryan performed general services for a title company, including creating compliance documentation, attending closings, drafting closing documents, and reviewing title.

General Professional Services Questionnaire

PROFESSIONAL NO. 5
Name & Title:
Dave Robichaux
Name of Firm with which associated:
CivicSource
Description of job responsibilities:
Primary roles include title examiner and legal researcher. Additionally, Dave Robichaux assists other members of the research/legal team in their various projects, such as Obituary and Heir Search.
Years' experience with this Firm:
4
Education: Degree(s)/Year/Specialization:
2014, B.S. in Finance and General Studies from Louisiana State University 2017, J.D./D.C.L. (Doctor of Comparative Law) from Louisiana State University
Other experience and qualifications relevant to the proposed Project:
Prior to joining CivicSource, Dave Robichaux served as a judicial intern for the Louisiana Court of Appeals, 1st Circuit, and practiced law in the areas of title research and tax sales.

General Professional Services Questionnaire

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

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
The City of New Orleans, LA Norman White, CFO (504) 658-1500 Norman.White@nola.gov	Manage title, mail, insurance and closing processes end-to-end. Services include: <ul style="list-style-type: none"> • abstracting property in accordance with ATLA standards • performing title examinations and curing encumbrances • sending notices required by law • issuing title commitments and title insurance policies for adjudicated properties • preparing and recording closing documents • conducting closings and managing disbursement of funds
Length of Services Provided:	Cost of Services Provided:
2014 - Present	\$0. All costs are paid by the purchaser.

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
East Baton Rouge Parish, LA William "Billy" Aaron Parish Attorney (225) 389-3114 waaron@brla.gov	Manage title, mail, insurance and closing processes end-to-end. Services include: <ul style="list-style-type: none"> • abstracting property in accordance with ATLA standards • performing title examinations and curing encumbrances • sending notices required by law • issuing title commitments and title insurance policies for adjudicated properties • preparing and recording closing documents • conducting closings and managing disbursement of funds
Length of Services Provided:	Cost of Services Provided:
2016-Present	\$0. All costs are paid by the purchaser.

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Caddo Parish, LA Steven Walker (318) 226 – 6932 swalker@caddo.org -and- James (Jimmy) Whittington (318) 226 – 6930 jwhittington@caddo.org	Manage title, mail, insurance and closing processes end-to-end. Services include: <ul style="list-style-type: none"> abstracting property in accordance with ATLA standards performing title examinations and curing encumbrances sending notices required by law issuing title commitments and title insurance policies for adjudicated properties preparing and recording closing documents conducting closings and managing disbursement of funds
Length of Services Provided:	Cost of Services Provided:
2017-Present	\$0. All costs are paid by the purchaser.

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
St. Tammany Parish, LA Joseph (Joey) Alphonse (985) 276 - 6390 jalphonse@stpgov.org	Manage title, mail, insurance and closing processes end-to-end. Services include: <ul style="list-style-type: none"> abstracting property in accordance with ATLA standards performing title examinations and curing encumbrances sending notices required by law issuing title commitments and title insurance policies for adjudicated properties preparing and recording closing documents conducting closings and managing disbursement of funds
Length of Services Provided:	Cost of Services Provided:
2016-Present	\$0. All costs are paid by the purchaser.

General Professional Services Questionnaire

PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Tangipahoa Parish, LA Jeff McNeely (985) 748 - 3211 jmckneely@tangipahoa.org	Manage title, mail, insurance and closing processes end-to-end. Services include: <ul style="list-style-type: none"> abstracting property in accordance with ATLA standards performing title examinations and curing encumbrances sending notices required by law issuing title commitments and title insurance policies for adjudicated properties preparing and recording closing documents conducting closings and managing disbursement of funds
Length of Services Provided:	Cost of Services Provided:
2014-Present	\$0. All costs are paid by the purchaser.

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Rapides Parish, LA Theresa Pacholik, Parish Treasurer (318) 473-6673 tpacholik@rppj.com	Manage title, mail, insurance and closing processes end-to-end. Services include: <ul style="list-style-type: none"> abstracting property in accordance with ATLA standards performing title examinations and curing encumbrances sending notices required by law issuing title commitments and title insurance policies for adjudicated properties preparing and recording closing documents conducting closings and managing disbursement of funds
Length of Services Provided:	Cost of Services Provided:
2019-Present	\$0. All costs are paid by the purchaser.

General Professional Services Questionnaire

PROJECT NO. 7	
Project Name, Location and Owner's contact information:	Description of Services Provided:
City of Lake Charles, LA Corey Rubin, Asst. City Attorney (337) 491-1523 corey.rubin@cityoflc.us	Manage title, mail, insurance and closing processes end-to-end. Services include: <ul style="list-style-type: none"> abstracting property in accordance with ATLA standards performing title examinations and curing encumbrances sending notices required by law issuing title commitments and title insurance policies for adjudicated properties preparing and recording closing documents conducting closings and managing disbursement of funds
Length of Services Provided:	Cost of Services Provided:
2017-Present	\$0. All costs are paid by the purchaser.

PROJECT NO. 8	
Project Name, Location and Owner's contact information:	Description of Services Provided:
St. Charles Parish, LA Michael J. Albert Director of Planning & Zoning (985) 783-5060 malbert@stcharlesgov.net	Manage title, mail, insurance and closing processes end-to-end. Services include: <ul style="list-style-type: none"> abstracting property in accordance with ATLA standards performing title examinations and curing encumbrances sending notices required by law issuing title commitments and title insurance policies for adjudicated properties preparing and recording closing documents conducting closings and managing disbursement of funds
Length of Services Provided:	Cost of Services Provided:
2017-Present	\$0. All costs are paid by the purchaser.

General Professional Services Questionnaire

PROJECT NO. 9	
Project Name, Location and Owner's contact information:	Description of Services Provided:
St. Bernard Parish, LA Jason Stopa, Director Dept. of Community Development (504) 355-4427 Ext. 1427 jstopa@sbpg.net	Manage title, mail, insurance and closing processes end-to-end. Services include: <ul style="list-style-type: none"> abstracting property in accordance with ATLA standards performing title examinations and curing encumbrances sending notices required by law issuing title commitments and title insurance policies for adjudicated properties preparing and recording closing documents conducting closings and managing disbursement of associated funds
Length of Services Provided:	Cost of Services Provided:
2015-Present	\$0. All costs are paid by the purchaser.

PROJECT NO. 10	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Livingston Parish, LA Susan Abels (225) 686-4420 sabels@lpgov.com	Manage title, mail, insurance and closing processes end-to-end. Services include: <ul style="list-style-type: none"> abstracting property in accordance with ATLA standards performing title examinations and curing encumbrances sending notices required by law issuing title commitments and title insurance policies for adjudicated properties preparing and recording closing documents conducting closings and managing disbursement of associated funds
Length of Services Provided:	Cost of Services Provided:
2017- Present	\$0. All costs are paid by the purchaser.

General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1.		No prior or ongoing litigation between Firm and Jefferson Parish.
2.		
3.		
4.		

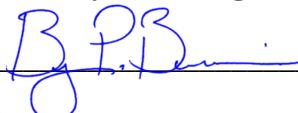
M. Use this space to provide any additional information or description of resources supporting Firm's qualifications for the proposed project.

CivicSource® creates technology that protects taxpayer property rights, guarantees investors insurable titles and provides collectors an online marketplace to host transparent property auctions and tax sales. Founded in 2008, CivicSource® has been recognized by Inc. magazine as one of "America's Fastest Growing Companies" and has been named one of New Orleans' "Best Places to Work" for eleven years, receiving the top honor in 2014 and 2020.

Developed at a cost of over \$10 million, CivicSource® provides a comprehensive adjudicated property solution for tax collectors – managing title, mail, insurance and closing processes end-to-end. CivicSource® exhausts due diligence efforts to ensure all homeowners, heirs and persons of interest affiliated with any adjudicated property are adequately notified before a property is auctioned.

The company's technology-driven approach adds value beyond tax revenue by returning tens of thousands of adjudicated, blighted and abandoned properties to commerce.

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

Signature:  Print Name: Bryan Barrios
 Title: CEO Date: 7/27/2022



Proposed Fee Schedule

Service	Fee	SOQ Line
Abstract	\$ 295.00	1
Title Examination	\$ 275.00	2
Document Preparation	\$ 800.00	3
Notary Fee	\$ 175.00	4
Closing Fee	\$ 175.00	5
Recording Services	\$ 50.00	6
Recording Fees	\$ 410.00	7
Title Updates	\$ 125.00	8
Title Insurance	\$ 1,150.00	9
Cancellation of Judgment or Lien	\$ 125.00	10
Legal Fees	\$ 1,025.00	11
Out-of Pocket Cost (mail costs)*	\$ 19.00	12
Act of Correction	\$ 200.00	13
Noticing required by State Law	\$ 390.00	14

CivicSource does not charge the Parish any of the above-listed fees. Rather these fees are charged to the purchaser as part of the acquisition of the adjudicated property and listed on the the closing statement (HUD-1).

*Out-of-Pocket fees (mailing costs) are per item to be mailed. All other fees are on a per property basis.

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

SOQ 22-040 Title and Closing Services
Resolution No. 139993

B. Firm Name & Address:

U.S. National Title Insurance Company
232 Market Street,
Suite 232
Flowood, MS. 39203

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

John P. Byers, III, President

D. Address of principal office where Project work will be performed:

Employees will work from home.

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

YES: _____ NO: X

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

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

1.

2.

General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES _____ NO _____		
H. List all subcontractors anticipated for this Project. Please note that <u>all subcontractors must submit a fully completed copy of this questionnaire</u>, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.		
Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. N/A-USNTI is a subcontractor		
2.		
3.		
4.		
5.		

General Professional Services Questionnaire

I. Please specify the total number of support personnel that may assist in the completion of this Project: <div style="border-bottom: 1px solid black; width: 100px; margin-top: 5px;">2</div>
J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.
PROFESSIONAL NO. 1
Name & Title:
John P. Byers, III - President
Name of Firm with which associated:
U.S. National Title Company
Description of job responsibilities:
Underwriting support, Claims, Licensing
Years' experience with this Firm:
4
Education: Degree(s)/Year/Specialization:
JD - LSU Law Center - 2014 BA - Texas A&M University - 2010
Other experience and qualifications relevant to the proposed Project:
Licensed Title Agent in Louisiana Member of the Louisiana Bar Association Licensed in all Louisiana Courts

General Professional Services Questionnaire

PROFESSIONAL NO. 2
Name & Title:
Emeline Caughlin
Name of Firm with which associated:
US National Title Insurance Company
Description of job responsibilities:
Book Keeping on the title insurance side
Years' experience with this Firm:
1
Education: Degree(s)/Year/Specialization:
NA
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

PROFESSIONAL NO. 3
Name & Title:
N/A
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

PROFESSIONAL NO. 4
Name & Title:
N/A
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

PROFESSIONAL NO. 5
Name & Title:
N/A
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

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

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
CivicSource Adjudications	US National has been the title underwriter on Louisiana Adjudicated properties for CivicSource since 2016
Length of Services Provided:	Cost of Services Provided:
6 years	Title policy on adjudicated properties plus endorsements covering tax sales start at \$1150.

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
N/A	
Length of Services Provided:	Cost of Services Provided:

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
N/A	
Length of Services Provided:	Cost of Services Provided:

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

General Professional Services Questionnaire

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

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

General Professional Services Questionnaire

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

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

General Professional Services Questionnaire

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

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

General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

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

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

Jefferson Parish
State of Louisiana

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

Signature:  **Print Name:** John P. Byers, III

Title: President **Date:** 7/25/2022

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

SOQ 22-040 Title and Closing Services
Resolution No. 139993

B. Firm Name & Address:

Dynamite Abstract and Title Company, LLC
2708 Acadiana Trace
Marrero, La
70072

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Tonya Bergeron, Owner

dynamiteabstract@gmail.com
(504) 382-2753

D. Address of principal office where Project work will be performed:

2708 Acadiana Trace
Marrero, LA 70072

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

YES _____ NO X

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

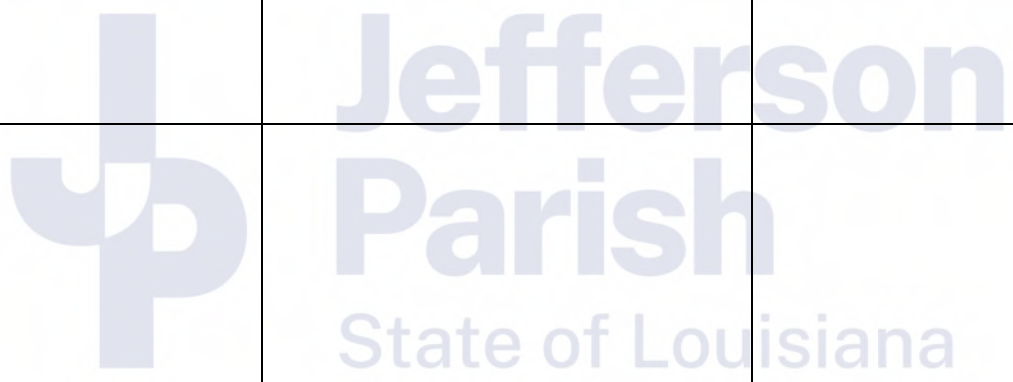
F. If submittal is by JOINT-VENTURE, list the firms participating and outline specific areas of responsibility (including administrative, technical, and financial) for each firm. Please attach additional pages if necessary.

1.

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General Professional Services Questionnaire

G. Has this JOINT-VENTURE previously worked together? Please check: YES _____ NO _____		
H. List all subcontractors anticipated for this Project. Please note that <u>all subcontractors must submit a fully completed copy of this questionnaire</u>, applicable licenses, and any other information required by the advertisement. See Jefferson Parish Code of Ordinances, Sec. 2-928(a)(3). Please attach additional pages if necessary.		
Name & Address:	Specialty:	Worked with Firm Before (Yes or No):
1. N/A		
2.		
3.		
4.		
5.		



General Professional Services Questionnaire

I. Please specify the total number of support personnel that may assist in the completion of this Project: <div style="border-bottom: 1px solid black; width: 100px; margin-top: 5px;">2</div>
J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.
PROFESSIONAL NO. 1
Name & Title:
Tonya Bergeron, Owner
Name of Firm with which associated:
Dynamite Abstracts and Title Company, LLC
Description of job responsibilities:
Retrieve tax information to prepare researches, research chain of title and make copies. Run names shown in chain of title to date write up inception sheets providing mortgages and liens. Reviewing searches for any missing information , invoicing, scanning emailing billing and accounting.
Years' experience with this Firm:
Company was established in April 2004 and has remained in operation for the past 18 years.
Education: Degree(s)/Year/Specialization:
October 1997 - Louisiana Notary Public 1993 to 1997 - Delgado Community College (No degree) 1987- West Jefferson High School - Graduate
Other experience and qualifications relevant to the proposed Project:
August 2000 to April 2004 - Abstractor at Punctual Abstract September 1989 to May 1999 - Administrative assistant to Commercial Services Department of First American title Insurance Company

General Professional Services Questionnaire

PROFESSIONAL NO. 2
Name & Title:
Taylor Bergeron
Name of Firm with which associated:
Dynamite Abstracting and Title Company, LLC
Description of job responsibilities:
Retrieve tax information to prepare researches, research chain of title and make copies. Run names shown in chain of title to date write up inception sheets providing mortgages and liens. Reviewing searches for any missing information , invoicing, scanning emailing billing and accounting.
Years' experience with this Firm:
11 years. September 2011 to present
Education: Degree(s)/Year/Specialization:
2011 Delgado Community College - No degree 2011 - Fisher High School - Graduate
Other experience and qualifications relevant to the proposed Project:
Bergeron has extensive experience researching title, including examining the history of the property and ownership and clearing liens or claims on the property.

General Professional Services Questionnaire

PROFESSIONAL NO. 3
Name & Title:
N/A
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

PROFESSIONAL NO. 4
Name & Title:
N/A
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

PROFESSIONAL NO. 5
Name & Title:
N/A
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

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

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Gulf South Title Corp.</p> <p>David Birdsong 2201 Veterans Blvd. Metairie, LA 70002</p> <p>504.780.9202</p>	<p>Tax Research</p> <p>30-year abstracts</p> <p>10-year Abstracts</p>
Length of Services Provided:	Cost of Services Provided:
<p>14 years</p>	<p>30-year Abstracts - \$150</p> <p>10-year Abstracts - \$125</p>

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Delta Title Corp</p> <p>Stacy Paisant 3625 N I10 Service Rd W. Metairie, LA 70002</p> <p>504.885.9222</p>	<p>Tax Research</p> <p>30-year abstracts</p> <p>10-year Abstracts</p>
Length of Services Provided:	Cost of Services Provided:
<p>9 years</p>	<p>30-year Abstracts - \$150</p>

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
D'Aquila, Contreras & Vega Jeff Jones 4141 Veterans Memorial Blvd. Suite 102 Metairie, LA 70002	Tax Research 30-year abstracts 10-year Abstracts Commercial Abstracts
Length of Services Provided:	Cost of Services Provided:
15 years	30-year abstracts: \$150 + copies

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Title Source, LLC Jennifer Q Belletto 664 Rosa Ave. Suite 100 Metairie, LA 70005 504.219.0284	Tax Research 30-year abstracts 10-year Abstracts
Length of Services Provided:	Cost of Services Provided:
10 years	30-year abstracts: \$150 + copies

General Professional Services Questionnaire

PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Crescent City Title Gail Smith-Swammer 3361 General DeGualle Dr. New Orleans, LA 70114 504.227.9898	Tax Research 30-year abstracts 10-year Abstracts
Length of Services Provided:	Cost of Services Provided:
13 years	30-year Abstracts \$150 + copies

PROJECT NO. 6	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Azlea Title , LLC Kenneth Bossetta 2713 Division St. Metairie, LA 70002 5041.488.5700	Tax Research 30-year abstracts 10-year Abstracts Commercial Abstracts
Length of Services Provided:	Cost of Services Provided:
13 years	30-year Abstracts: \$150 + copies

General Professional Services Questionnaire

PROJECT NO. 7	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Pelican Title Ken Moran 102 Fountainbleau Dr. Suite E-3 Mandeville, LA 70471 985.246.1999	Tax Research 30-year abstracts 10-year Abstracts
Length of Services Provided:	Cost of Services Provided:
6 years	30-year Abstracts: \$150 + copies

PROJECT NO. 8	
Project Name, Location and Owner's contact information:	Description of Services Provided:
United Title of LA Stephanie De Broecke One Bellemead Center 6425 Youree Dr. Suite 140 Shreveport, LA 71105 318.795.3865	Tax Research 30-year abstracts 10-year Abstracts
Length of Services Provided:	Cost of Services Provided:
16 years	30-year Abstracts: \$150 + copies

General Professional Services Questionnaire

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

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

General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

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

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

Jefferson Parish
State of Louisiana

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

Signature: Tonya Bergeron **Print Name:** Tonya Bergeron
Title: Manager / owner **Date:** 7/21/22

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

SOQ 22-040 Title and Closing Services
Resolution No. 139993

B. Firm Name & Address:

Kimberly Savage, Owner & Genealogist
951 West 2800
South Syracuse,
UT 84075

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Kimberly Savage
kimsavage75@yahoo.com

D. Address of principal office where Project work will be performed:

951 West 2800
South Syracuse, UT 84075

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

YES _____ NO X

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

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

1.

2.

General Professional Services Questionnaire

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

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

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

General Professional Services Questionnaire

I. Please specify the total number of support personnel that may assist in the completion of this Project: <u> 1 </u>
J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.
PROFESSIONAL NO. 1
Name & Title: Kimberly Savage, Owner & Genealogist
Name of Firm with which associated: Kimberly Savage, Owner & Genealogist
Description of job responsibilities: Projects are completed based on the scope of work provided by the client. Ancestral and descendant research is performed by using various on-line repositories to locate primary and secondary documentation to prove and build a tree and family relationships.
Years' experience with this Firm: 20 plus years
Education: Degree(s)/Year/Specialization: 1999 BS Degree from Weber State University in Health Information Management of Records & Information Systems and Technology. Registered Health Information Administrator 1998 Associates Degree from Weber State University in Medical Records. 1995 Studied abroad with BYU Jerusalem.
Other experience and qualifications relevant to the proposed Project: Genealogy researcher for more than 20 years. Worked as Vice President of Family History Expos. Research Manager with My Ancestors Found. Managing more than 80 researchers and their genealogy projects worldwide. Specializing in ancestral and descendant research. Instructs classes in research and fun, creative ways to involve others in family history. Worked at numerous Research Retreats at the Family History Library in Salt Lake City, Utah and other repositories in diverse cities across the US with My Ancestors Found. Helped produced more than 100 unique syllabus and class handout books for Family History Expos attendees. Published articles in the Everton's Genealogical Helper magazine, and helped compile the 11th edition of The Handybook for Genealogists, with more than one million copies sold. Served as Vice President of the Utah Genealogical Association.

General Professional Services Questionnaire

PROFESSIONAL NO. 2
Name & Title:
N/A
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

PROFESSIONAL NO. 3
Name & Title:
N/A
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

PROFESSIONAL NO. 4
Name & Title:
N/A
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

PROFESSIONAL NO. 5
Name & Title:
N/A
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

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

PROJECT NO. 1

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Family History Expos My Ancestors Found PO Box 187 Morgan, Utah 84050 801-829-3295 info@familyhistoryexpos.com</p>	<p>Projects are completed based on the scope of work provided by the client. Ancestral and descendant research is performed by using various on-line and local repositories to locate primary and secondary documentation to prove and build a tree and family relationships. Types of documents provided - birth, marriage, death, land, newspaper articles, city directories, SSDI, cemetery records, naturalization, funeral records, school records, family histories, etc. The client completes a research questionnaire and provides a research goal. Based on the questions a scope of work is provided and if approved research is performed. A Research Report was written and all documents discovered were provided to the client.</p>
Length of Services Provided:	Cost of Services Provided:
<p>Depends on each client</p>	<p>Depending on where the location of research the fee ranges between \$50-75 per hour.</p>

PROJECT NO. 2

Project Name, Location and Owner's contact information:	Description of Services Provided:
<p>Family History Expos My Ancestors Found PO Box 187 Morgan, Utah 84050 801-829-3295 info@familyhistoryexpos.com</p>	<p>5 day Research Retreats at the Family History Library in Salt Lake City, Utah. Research classes would be taught each morning and then research would be conducted at the Library. One on one assistance would be provided to find the ancestors or descendants of the research attendees.</p>
Length of Services Provided:	Cost of Services Provided:
<p>Each retreat was 5 days</p>	<p>\$500-\$750</p>

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
N/A	
Length of Services Provided:	Cost of Services Provided:

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

General Professional Services Questionnaire

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

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

General Professional Services Questionnaire

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

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

General Professional Services Questionnaire

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

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

General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

Parties:		Status/Result of Case:
Plaintiff:	Defendant:	
1. None - N/A	None - N/A	N/A
2.		
3.		
4.		

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

Jefferson Parish
State of Louisiana

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

Signature: Kimberly Savage Print Name: Kimberly Savage
 Title: owner/vendor Date: 7/20/2022

General Professional Services Questionnaire

A. Project Name and Advertisement Resolution Number:

SOQ 22-040 Title and Closing Services
Resolution No. 139993

B. Firm Name & Address:

Kristi Randall
869 West 2700
South Syracuse, Utah
84075

C. Name, title, & contact information of Firm Representative, as defined in Section 2-926 of the Jefferson Parish Code of Ordinances, with at least five (5) years of experience in the applicable field required for this Project:

Kristi Randall
krfamilyresearch@gmail.com

D. Address of principal office where Project work will be performed:

869 West 2700
South Syracuse, Utah 84075

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

YES _____ NO _____

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

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

1.

General Professional Services Questionnaire

2.

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

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

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

General Professional Services Questionnaire

5.		
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I. Please specify the total number of support personnel that may assist in the completion of this Project:
_____1

J. List any professionals that may assist in the completion of this Project. If necessary, please attach additional documentation that demonstrates the employment history and experience of the Firm's professionals that may assist in the completion of this Project (i.e. resume). Please attach additional pages if necessary.

PROFESSIONAL NO. 1

Name & Title:

Kristi Randall, Owner & Geneologist

Name of Firm with which associated:

UpWork

Description of job responsibilities:

- Locating deceased family members; providing family group sheet(s).
- Locating living heirs for settling estates or abandoned property
- Providing the data in a research report, compiled genealogy, or biographical sketch format – with sources documented.
- Breaking through 'brick walls'
- Helping others not only find their family, but hopefully discover their stories, who they were, and where they lived.

Years' experience with this Firm:

General Professional Services Questionnaire

3 years

Education: Degree(s)/Year/Specialization:

Associate of Arts in Journalism – 1992

Local college Genealogy Program: US Track in Genealogy 2019

RootsTech 2017-2019 – Yearly three-day genealogical event – attending various genealogy classes from 8a-5p daily – pertaining to what I wanted to learn

2020-2022 – After Covid RootsTech was offered online for the three-day event.

Other experience and qualifications relevant to the proposed Project:

PROFESSIONAL NO. 2

Name & Title:

Name of Firm with which associated:

Description of job responsibilities:

Years' experience with this Firm:

Education: Degree(s)/Year/Specialization:

General Professional Services Questionnaire

Other experience and qualifications relevant to the proposed Project:

PROFESSIONAL NO. 3
Name & Title:
Name of Firm with which associated:
Description of job responsibilities:
Years' experience with this Firm:
Education: Degree(s)/Year/Specialization:
Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

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PROFESSIONAL NO. 4

Name & Title:

Name of Firm with which associated:

Description of job responsibilities:

Years' experience with this Firm:

Education: Degree(s)/Year/Specialization:

Other experience and qualifications relevant to the proposed Project:

General Professional Services Questionnaire

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PROFESSIONAL NO. 5

Name & Title:

--

Name of Firm with which associated:

--

Description of job responsibilities:

--

Years' experience with this Firm:

--

Education: Degree(s)/Year/Specialization:

--

Other experience and qualifications relevant to the proposed Project:

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General Professional Services Questionnaire

K. List all prior projects that best illustrate the Firm's qualifications relevant to this Project. Please include any and all work performed for Jefferson Parish. Please attach additional pages if necessary.	
PROJECT NO. 1	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Private Client	<ul style="list-style-type: none">• Provided genealogy research beginning with the clients' grandparents and researched 6 generations of his family in Northern California and other states, providing family group sheets, sourced documents, obituaries, a genealogy report, and research log.
Length of Services Provided:	Cost of Services Provided:
6 months	\$25/hour – 5 hr. weekly limit

PROJECT NO. 2	
Project Name, Location and Owner's contact information:	Description of Services Provided:

General Professional Services Questionnaire

Private Client	<ul style="list-style-type: none">• Client wanted to expand his family tree. Began with what was known - his parents, and deceased grandparents. Researching in Arizona and Texas. The deceased paternal grandfather was on the FBI's top 10 wanted list and I was able to locate many of his crimes and locations through the newspapers, along with information from his trial.• Also, discovered the client's living great-uncle and his family. The client was able to contact the family and has remained to touch. In early 2021, the great-uncle and his spouse died due to Covid.• Provided client with group sheets, sourced documents, obituaries, newspaper articles, a genealogy report, and research log.
Length of Services Provided:	Cost of Services Provided:
2 years	Volunteered services

General Professional Services Questionnaire

PROJECT NO. 3	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Private Client	<ul style="list-style-type: none"> Provided research for client who wanted to trace their paternal family line from the Island of Oahu, Hawaii to Portugal. Second project for family – tracing the maternal family line from the Island of Oahu, Hawaii to Portugal. For both projects: Provided family group sheets, sourced documents, obituaries, a genealogy report, and research log.
Length of Services Provided:	Cost of Services Provided:
2 months	\$125/project

PROJECT NO. 4	
Project Name, Location and Owner's contact information:	Description of Services Provided:
The Church of Jesus Christ of Latter-day Saints	<ul style="list-style-type: none"> Taught classes for youth and adults how to Index records that would be added to the Family Search database. I have taught classes for 50+ people, smaller groups, and one-on-one. Taught an adult class on Why Family History is Important.
Length of Services Provided:	Cost of Services Provided:
9 years – when asked to teach	Volunteer

General Professional Services Questionnaire

PROJECT NO. 5	
Project Name, Location and Owner's contact information:	Description of Services Provided:
Private Client	<ul style="list-style-type: none"> Client was trying to 'break down a brick wall' and locate a deceased relative and family. On a hunch, I was able to locate the relative. Build a tree with the parents and siblings as well as descendants. Provided family group sheets, sourced documents, obituaries, a genealogy report, and research log.
Length of Services Provided:	Cost of Services Provided:
2 months	\$100

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

General Professional Services Questionnaire

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

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

General Professional Services Questionnaire

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

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

General Professional Services Questionnaire

L. List all prior and/or on-going litigation between Firm and Jefferson Parish. Please attach additional pages if necessary.

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

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

General Professional Services Questionnaire

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

Signature: Kristi Randall **Print Name:** Kristi Randall

Title: Genealogy Researcher **Date:** July 25, 2022

Bryan Barrios
Chief Executive Officer
CivicSource®

CivicSource
PO Box 10005
New Orleans, LA 70150-0001

O: 504-267-0065

C: 504-214-8101

D: 504-708-4312

F: 504-267-0067

E: bryan@civicsource.com

W: <http://www.civicsource.com>

Profile

- 20 years executive management experience
- 15 years tax-related legal experience
- 10 years tax-related legislative activism
- Innovative, organized, motivated leader and detail-directed problem solver

Overview

Experience

- Co-founder and CEO of CivicSource®
- Co-founder and Executive Director of Strategic Alliance Partners, L.L.C.
- Founder and Director of Scheuermann & Jones Tax Administration Division

Innovations

- Designed a market driven tax adjudicated property online sale platform in 2011
- Directed the use of online tax lien/deed platform for the disposition of tax lien certificates in Louisiana, which hosted the first online tax sale on the Gulf Coast in 2007.
- Designed technology solution that digitizes pre-tax sale Constitutional due process compliance in 2005.

Results

- Collected over one-quarter billion dollars in delinquent property taxes and sold thousands of tax certificates online on behalf of over 40 political subdivisions, in fewer than 5 years.
 - Moved large volume property tax sales in Louisiana from courthouse crier to online, in fewer than 5 years.
 - Negotiated settlements for 75 contested sales and use tax assessments yielding \$10.8 million in revenue.
-

Daniel E. Rebeor
Chief Operating Officer
CivicSource

CivicSource
PO Box 10005
New Orleans, LA 70150-0001

O: 504-267-0065
D: 858-568-3967
E: dan.rebeor@civicsource.com
W: <http://www.CivicSource.com>

Profile

- Growth: Built a nationwide real estate portfolio for Landmark and Cricket, driving rapid acquisition and expansion.
- Operational Startup: Built Real Estate, Legal, and Operations organizations from the ground up for Landmark, American Tower, and Cricket: Efficient operations, clear and consistent processes, top-performing teams.
- Turnaround: Transformed real estate technology services company from 5 years of underperformance to profitability in 9 months.

Experience

CivicSource	Chief Operating Officer`	2021 - Present
	<ul style="list-style-type: none">• Lead the day-to-day operation for a leading provider of technology solutions that protects taxpayer property rights, guarantees investors insurable titles and provides collectors an online marketplace to host transparent property auctions and tax sales.• Develop and execute on the company's short term and long-term business plans.• Provide both strategic and tactical guidance to the organization.• Build relationships with elected officials and real estate investors to build and grow the business.• Develop new solutions and products to enhance the growth of the company.	
BLVCKDOT, LLC	Chief Operating Officer & General Counsel	2018 – 2020
	<ul style="list-style-type: none">• Operational and legal leadership for an early stage start up focused on providing technology solutions for commercial real estate owners in the areas of smart building solutions, building management systems, broadband and energy conservation.• Developed the processes and procedures necessary to move the company successfully into new verticals and markets, since Q1 2019 have expanded into three new business lines, all of which are profitable.• Build out the operations organization to quickly integrate new customers.• Partnered with CTO to develop market ready products from the company's IT platform.• Improved KPI performance with a renewed focus on cycle times and throughput.• Created Legal Department by establishing the processes, procedures and protocols needed in a high-growth organization.	
CBRE, Inc	Director Retail Operations	2018
	<ul style="list-style-type: none">• Leadership of the retail operations team for a major U.S. wireless carrier on behalf of the top full-service real estate services and investment organization in the world. Responsible for transaction management, project management and oversight of all retail activity for the account.• Restructured organization to improve market knowledge and support of customer's sales leadership team.	

- Streamlined operations to reduce key leasing cycle times.
- Improved KPI performance by implementing an enhanced focus on training and process management.
- Instituted improved reporting and data integrity to assist customer in better managing its portfolio.
- Improved customer engagement by establishing a 1:1 relationship between transaction managers and the customers' senior field leadership, resulting in improved response times and customer service.
- Improved client decision making by revamping customer's approval process for renewals, relocations and terminations.
- Generated \$6.4M in savings during the first full quarter of team leadership.

Tavistock Development Company

Senior Vice President

2016 – 2017

- General management of 4 subsidiaries providing wireless technologies and services to 2,500 customers in Lake Nona—the only Iconic Cisco Smart+Connected community in the US. \$8M P&L; business development and sales; operations and innovation.
- Returned company to profitability within 9 months.
- Improved margins 15% across all business lines.
- Generated \$5M+ revenue in first year following launch of 3 new product lines that expanded commercial sales.
- Increased sales 50% and average sale 75% by overhauling entire sales and marketing strategy. Established new website, retail locations, and product mix.
- Crafted comprehensive growth plan to achieve sustainable long-term profitability and/or sale of the business.
- Created visibility and transparency into business performance by upgrading and replacing all company systems and processes, enabling immediate and accurate P&L and operational reporting.
- Achieved 100% on-time, on-budget delivery of commercial, multi-family, and residential services after revamping all design, construction, and service processes.

Landmark Dividend, LLC

Executive Vice President of Operations & General Counsel

2011 – 2016

- Operational and legal leadership for the foremost specialty real estate investment firm in the US and its publicly traded subsidiary, Landmark Infrastructure Partners LP (NASDAQ: LMRK).
- In 6 months multiplied acquisition volume more than 4-fold: from 10 assets acquired per month to 40, from \$2M per month to \$10M–\$15M.
- Closed 90% of transactions within 45 days and led team in integrating assets—both single transactions and large-scale acquisitions valued up to \$10M.
- Acquired assets with a value in excess of \$500M.
- Created company's first asset management function to protect and grow the value of 3,000 assets. Led tenant and landlord relations team that resolved 95% of issues within 30 days.
- Slashed legal expenses 15% through new system for managing outside counsel. Established in-house legal department (5 attorneys, 6 paralegals) and corporate secretary system to oversee 30 US and foreign entities.
- Laid legal and operational groundwork for successful IPO.

Cricket Communications, Inc.

Senior Director, National Real Estate

2007-2011

- Led entire real estate function for fast-growing wireless service provider: site selection, leasing, construction, property management, lease administration, corporate facilities. \$40M+ capital & operating budget.
- Built team of 30 real estate professionals, created department plans and processes, and led a vigorous acquisition strategy that created a 2M+ sq. ft. portfolio of 12,000 cell sites, 348 retail stores, 35 offices, and 30 data centers, with an annual rent roll exceeding \$200M.
- Chaired the company's site selection team and led high-volume expansion strategy—adding 75 company stores and 250 premier dealer locations per year, at lease rates 15% below market and with deal cycle averaging just 90 days. Introduced a new site selection and optimization model that incorporated analytics and demographic data.
- Captured \$55M+ savings and positioned Cricket for growth in major markets nationwide by negotiating

favorable lease agreements with leading tower companies and DAS providers.

- Led team that simultaneously built 200,000 sq. ft. corporate HQ in San Diego and 95,000 sq. ft. operational HQ in Denver. Completed both projects on time, 10% under budget, and with LEED Gold certification. Recognized with the company's top employee award.
- Directed national construction team that averaged 150 new store, remodel, and refresh projects yearly. Managed portfolio with an eye toward continuous cost reduction. Representative savings:
 - 50% in lease administration through outsourcing.
 - 30% in utility costs through implementing an energy-reduction program for all retail sites nationwide.
 - 15% in store startup costs by value-engineering store design.
 - \$2M yearly following portfolio-wide review of regional offices that led to space reductions and closings.
 - \$3M in recovered tenant improvement allowances previously deemed "uncollectable."

**American Tower Corporation
SpectraSite Communications, Inc.**

Director of Operations, Director of Real Estate

2000-2007

- Recruited to early-stage company to help drive rapid growth; Assessed, acquired, and managed a portfolio that grew to 8,000 cell-tower sites nationwide. Following acquisition of SpectraSite by ATC in 2005, remained to manage operations and real estate teams for the Building Solutions group.
- From the ground up, built a 30-person Real Estate Operations team located across the US. Consistently exceeded all annual objectives by at least 10% and delivered results 15% under annual expense budget.
- Negotiated 500+ ground leases, amendments, and easements annually, averaging 5%–10% below market rate.
- Prepared 8,000 legal documents per year with an average cycle time of less than 1 ½ days.
- Developed and maintained relationships with 100+ major real property owners, including GE, Simon, Westfield, General Growth Properties, Taubman, MGM Mirage, Harrah's, Starwood, Hilton, Marriott.

Education & Licenses

Attorney at Law
State of Ohio
1994

Authorized House Counsel
The Florida Bar
2018

University of North Carolina at Chapel Hill
Keenan-Flagler Business School
Chapel Hill, North Carolina
Executive Education Program
May 2006

University of Dayton, School of Law
Dayton, Ohio
Juris Doctor
May 1994

State University of New York at Fredonia
Fredonia, New York
Bachelor of Science
December 1989

AnneMarie “A.M.” Sledge
Attorney
CivicSource

CivicSource
PO Box 10005
New Orleans, LA 70150-0001

O: 504-267-0065
D: 985-981-1576
E: AM.Sledge@civicsource.com
W: <http://www.CivicSource.com>

Experience

CivicSource	Attorney	2018 - Present
<ul style="list-style-type: none">Review abstracts; Plot legal descriptions; Issue title opinions; Consult with taxing authorities; Solve legal issues; Review Contracts; Manage 9 person research team; Draft title documents; Handle complaints; Review legislation; Conduct statutory analysis; Implement legal review processes; Coordinate with vendors; Oversee all property research.		
Rolling, Perrilloux, & Sledge LLC	Associate Attorney	2017 – 2018
<ul style="list-style-type: none">Drafted petitions and motions; Established the firm’s Policy and Procedure required for compliance with the American Land and Title Association; attended meditations; sat in on client meetings; acted as liaison between Real Estate Secretary and Banks; implemented Privacy and Information Security procedure and Settlement Process procedure; frequently met with partners to better serve clients.		
Admission Office Mississippi College School of Law	Admission Counselor	2016 – 2017
<ul style="list-style-type: none">Traveled across the country to Career fairs promoting MC Law; worked closely in a fast pace environment with the Dean of Admission and the Director of Admissions; Sold students on the benefits of Law School in general; Highlighted MC Law’s best features; Networked with Recruiters. Created undergraduate pre-law minor curriculum; Assisted Marketing Director with creating promotional material; Counseled current and potential students on the legal world;		
21 st Judicial District Court	FINS officer	2012 – 2013
<ul style="list-style-type: none">Worked with schools in the area to ensure that at risk students were attending school; met with teachers, administration, and family to assess the child’s wellbeing; created a preventative program to identify at risk children and help ensure that they stay in school;		

Education and Certifications

Licensed to practice law in the State of Louisiana.

MISSISSIPPI COLLEGE SCHOOL OF LAW, Jackson, MS

- Doctor of Jurisprudence May 2016
- Recipient, Merit Scholar Award, 2013-2016
- Recipient, Dean's List, Fall 2015 and Spring 2016
- Recipient, Patricia Evans Scholarship Award, 2015
- Recipient, Law School Student Body President's Award, 2016
- Study abroad: May-August 2014
 - International Criminal Law: Beijing, China; Status of Force agreements: Soule, Korea
 - European Union Law: Berlin Germany
 - Comparative Products liability and Comparative Security Regulations: Lile, France
- Dean's Ambassadors (Director/Founder) January 2015-May 2016
- Law School Student Body Association (Secretary) April 2015-May 2016
- Civil Law Society (Vice-President) April 2015-May 2016

LOUISIANA TECH UNIVERSITY, Ruston, LA

Bachelor of Arts in Psychology May 2012

- Recipient, Dean's List, 9 out of 12 Quarters

Lauren Thompson Ryan
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Experience

CivicSource	Senior Title Attorney	2018 – Present
<ul style="list-style-type: none">• Review chain of title and associate title attorneys' examinations for all adjudication sales files• Insurability Review - review all files, research and noticing to ensure our work conforms to the letter of the law and the standards set by US National Title Insurance• Manage 4 interested party (genealogy) researchers• Office advisor on Rhode Island tax law• Draft interdepartmental procedure protocols• Draft ordinances and notices for tax authority clients• Answer purchaser and potential purchaser questions		
The Title Company, Baton Rouge	Attorney/Escrow Officer	2016 – 2017
<ul style="list-style-type: none">• Follow files from beginning to end – open files, send abstract requests, prepare closing disclosures, clear liens and other similar issues on title, conduct closings		
Keller Williams Realty Redstick Partners	Realtor	2014 – 2015
<ul style="list-style-type: none">• Worked with clients for the purchase and sale of residential homes, working from internal database of leads• Prepared accurate sales agreements within critical timelines and attended closings		
Dodson, Hooks & Frederick	Associate	2014 – 2014
<ul style="list-style-type: none">• Drafted petitions, motions, responses to discovery• Discussed cases with clients• Researched case topics		
Akers & Wisbar	Contract Attorney	2013 – 2014
<ul style="list-style-type: none">• Researched case topics		

Education and Certifications

Paul M. Hebert Law Center, Louisiana State University, Baton Rouge, Louisiana

- Juris Doctor/Graduate Diploma in Comparative Law May 2013

Louisiana State University, Baton Rouge, Louisiana

- Bachelor of Science, Accounting May 2010

Licensed to practice law in the State of Louisiana
Licensed title producer in the State of Louisiana

Education and Certifications

Education

PAUL M. HEBERT LAW CENTER, LOUISIANA STATE UNIVERSITY, Baton Rouge, LA

- Doctor of Jurisprudence, June 2017
- Degree in Comparative Law, June 2017
- Recipient, CALI Award for Highest Grade in Legal Research and Writing, Fall 2014
- Recipient, CALI Award for Highest Grade in Sales and Real Estate, Summer 2015
- Recipient, CALI Award for Highest Grade in Corporate Governance Seminar, Spring 2016
- Recipient, CALI Award for Highest Grade in Estate Planning, Spring 2017

LOUISIANA STATE UNIVERSITY, Baton Rouge, LA

- Bachelor of Science in Finance, May 2014
- Honors: *magna cum laude*
- National Honors Society

Certifications

TITLE INSURANCE PRODUCER, Louisiana Department of Insurance, Effective date 10/14/2020, License No. 904279

BAR ADMISSION, LOUISIANA STATE BAR, Sworn in October 19, 2017, LSBA No. 37844

Dave Robichaux
Title Attorney
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Experience

CivicSource	Title Attorney	2018 - Present
<ul style="list-style-type: none">Conduct title exams, write title opinions, build chains of title, and research interested parties in order to facilitate taxing authorities in meeting the demands of Due Process required by the 14th Amendment to the U.S. Constitution in the context of collecting delinquent property taxes in the form of a tax sale; manage the outsourcing of title exams and audit the inflow and outflow of accounts in the title exam queue; complete various research tasks – such as statutory analysis, creating research outlines, and drafting legal memos		
Barrios, Kingsdorf & Casteix, LLP	Contract Attorney	January 2018 - April 2018
<ul style="list-style-type: none">Conducted plaintiff side document review.		
Honorable J. Michael McDonald, Louisiana Court of Appeal, First Circuit	Judicial Extern	Spring 2017
<ul style="list-style-type: none">Helped draft and edit judicial opinions, such as record checking, cite checking, re-writing for clarity, etc.; Conducted legal research on various civil and criminal matters; Drafted memos to advise the Judge on issues; Observed oral arguments;		