



Basic Information Requirements

- a) Name of firm: Accurate Appraisal LLC
- b) Name and title: Jim Danielson, Owner
- c) Mailing Address: PO Box 415 Menasha, WI 54952-0415 E-Mail Address: jimd@accurateassessor.com
- d) Telephone and Fax numbers: P 920-749-8098 F 920-749-8099
- e) I, Jim Danielson, have the authority to commit my firm to the terms proposed.

Business Philosophy

In an effort to deliver a high level of service to our clients, Accurate has created an operational philosophy that ensures that clients are the focus of everything we do. Customer service is the main priority of Accurate. Our goal is to inform and educate the taxpayers, so that all constituents feel like they have been treated fairly and equitably. We will do everything we can to execute this plan.

Basic Qualifications and Experience

- a) We are a statewide assessing firm that is the statutory assessor for 97 municipalities (list and contact information attached). We started our business in the fall of 2000 and now we have 23 full-time employees at Accurate Appraisal LLC - 9 of which are State certified Level 2, 6 are Level 1 and 5 have the Technician certification. We will have specific contacts for your account to allow for seamless transition (resumes attached).
- b) The primary management contact person is Jim Danielson, supported by a level 2 project manager, as well as a personal property coordinator.
- c) Resume for Jim Danielson, owner is enclosed.

Our Proposed Rates

- a) Our rate is an all inclusive annual flat rate



Agreement for Assessment Services

Prepared for:

Village of Shorewood Hills

By

Accurate Appraisal, LLC.

AGREEMENT FOR ASSESSMENT SERVICES

Section I

This agreement made this _____ day of _____, 2016 by and between the Village of Shorewood Hills, Dane County, State of Wisconsin, party of the first part, hereinafter referred to as "Client",

AND

ACCURATE APPRAISAL LLC., PO BOX 415, MENASHA, WI 54952, party of the second part, hereinafter referred to as "Accurate".

SCOPE OF SERVICES

Accurate shall provide the Client with assessment services by Wisconsin Department of Revenue Certified Personnel for the 2017-2021 assessment year, which includes the following:

1. Accurate shall update and maintain 100% real property assessment records for the Client. Said service shall include all assessing services so as to comply with all applicable Wisconsin statutes, codes, rules, and/or regulations, including the assessment of all new construction, remodeling, additions and changes relating to improvements removed for any reason such as fire, demolition, etc. through building permits. Accurate shall reapportion value brought about through property splits. Accurate will physically inspect 50% of the parcels in 2017 & 2018. A Full Revaluation will be completed in 2018. Each year after that, Accurate will perform Full Value Maintenance with no physical inspections.
2. Accurate shall prepare and mail personal property blotters from a list supplied by the Client of the accounts to be assessed. Accurate will analyze returned personal property blotters from the merchants in order to establish the proper assessment.
3. Accurate shall, without additional expense to the Client, be required to attend Open Book and all Board of Review meetings and shall be responsible for defending all assessments. The Open Book meeting shall be conducted as needed. The meetings shall be scheduled by Accurate with the Clerk. The Open Book meetings shall be completed no later than the agreement date specified in Section III of this agreement.

4. Accurate shall enter real estate and personal property assessments in the current assessment roll so that it may be submitted to the Board of Review.
5. Accurate shall retain the right to employ additional certified personnel at Accurate's expense as deemed necessary to complete the assessment roll in a timely manner. Responsibility for the content and accuracy of the assessment roll regardless of the use of other personnel shall, however, rest with Accurate.
6. The Client's responsibilities will be to supply Accurate with adequate office space in or near the Client's Hall. Items to be mailed such as, but not limited to, assessor's final report and personal property blotters will be the responsibility of Accurate.
7. The Client will hold harmless Accurate from third party claims and liabilities due to the assessment of property except claims or liabilities, which result from the intentional or negligent acts or omissions of Accurate, its employees, agents and representatives, shall be the responsibility of Accurate.
8. This agreement between the Client and Accurate shall be for the aforementioned assessment year beginning January 1st, 2017 and ending December 31st, 2021. It is expected the work will commence with the mailing of personal property blotters and be completed after the final adjournment of the Board of Review and any necessary follow up questions and/or work because of appeals of Board of Review decisions.
9. Accurate shall submit four equal installments/invoices based upon a percentage complete between January 1 and that the completion of Board of Review. The Client reserves the right to retain a 10% holdback pending final completion of all terms and conditions of the contract.
10. Accurate shall provide advice and opinion for assessment matters and will defend values through the appeal process beyond the Open Book and Board of Review.
11. Accurate shall complete its Open Book hearings under this agreement no later than the agreement date, specified in Section III of this agreement, except for delays caused by the Client, county or state. Accurate may request a thirty-day extension to the contract upon written agreement with the Client.

12. Accurate shall maintain full insurance coverage to protect and hold harmless the Client. Limits of liability shall be not be less than the amounts listed below in this contract:

INSURANCE COVERAGE

General Liability

General Aggregate	\$ 4,000,000
Each Occurrence	\$ 2,000,000
Personal & Adv Injury	\$ 2,000,000
Products-Comp/Op Agg	\$ 4,000,000
Fire Damage	\$ 300,000
Medical Expense	\$ 10,000

13. Accurate shall consider the cost approach, market approach, and income approach in the valuation of all land and improvements where applicable.
14. Accurate shall use Computer Assisted Mass Appraisal software to accurately provide the Client with records of the maintenance and revaluation. For both residential and commercial valuation, GVS or Prolorem will be utilized following market data, Volume II of the Assessor manual and Marshall & Swift cost tables. The yearly maintenance fee associated with the use of either program will be at no additional expense to the Client. The data will be available to the public on accurateassessor.com; building data and appointment scheduling at no additional expense to the Client.
15. Photographs of all improved parcels will be taken digitally at no additional expense to the Client.
16. All expenses incurred by Accurate during the contract such as postage, phone calls, etc...., will be at no additional expense to the Client.
17. Accurate will promote understanding of the assessment process with taxpayers and the Client. The Client and Accurate shall work to maintain good public relations throughout the assessment program. Accurate shall mail initial informational postcards to all property owners explaining the revaluation process.

Section II

Parcel Totals:

Residential Total = 680

Residential Improved = 663

Commercial Total = 31

Commercial Improved = 26

Personal Property = 112

2015 Assessment Ratio = .9050

Section III

Agreement for Assessment Services

Provided by Accurate Appraisal, LLC.

For

Village of Shorewood Hills, Dane County for the assessment years 2017-2021

Dated this _____ day of _____ 2016.

**Agreement completion date of August 31st for Full Revaluation
Agreement completion date of June 30th for Regular Maintenance**

Fee for services rendered:

Accurate shall be paid the sum of:

See Pricing Sheet

Jim Danielson
Member
Accurate Appraisal, LLC.

Date

Authorized Client Signature

Date

Type of Assessing Service and Price

Option A: \$18,500 per year for Regular Maintenance, Full Revaluation, & Full Value Maintenance

1. 2017 will be Regular Maintenance with 50% physical inspection of the interior & exterior. 2018 will be the Full Revaluation with the remaining 50% physical inspection of the interior & exterior. 2019-2022 will be Full Value Maintenance, which includes a revaluation and Regular Maintenance. This price includes everything in the bid and will not exceed this amount.

Option B: \$19,000 per year for Regular Maintenance, Full Revaluation, & Full Value Maintenance

1. 2017 will be Regular Maintenance with 50% physical inspection of the interior & exterior. 2018 will be the Full Revaluation with the remaining 50% physical inspection of the interior & exterior. 2019-2021 will be Full Value Maintenance, which includes a revaluation and Regular Maintenance. This price includes everything in the bid and will not exceed this amount.

Option C: \$18,000 per year for 1 year of Market Revaluation and 2 years of Regular Maintenance.

1. 2 years will be a will be Regular Maintenance and 1 year will be a Market Revaluation. Client picks the year of the Market Revaluation. This price includes everything in the bid and will not exceed this amount.

****The purpose of this is to provide the Village of Shorewood Hills multiple options to choose from – whichever option is chosen, Accurate Appraisal, LLC can guarantee we will strive to provide the best customer service in the industry.

References

Joan Andrusz, City Clerk
City of Monona
5211 Schluter Rd
Monona, WI 53716
608-222-2525

John Somers, Finance Dir.
City of Beaver Dam
205 S Lincoln Ave
Beaver Dam, WI 53916
920-887-4600 ext 349

Renee Schwass, Business Mgr
Town of Madison
2120 Fish Hatchery Rd
Madison, WI 53713
608-210-7260

Peggy Haag, Village Clerk
Village of Oregon
117 Spring St.
Oregon, WI 53575
608-835-3118

Cheryl Sutter, Finance Director
Village of Mt. Horeb
138 E Main St
Mount Horeb, WI 53572
608-437-6884 ext 106

ACCURATE APPRAISAL, LLC CURRENT CLIENTS

MUNICIPALITY	TYPE	JOB TYPE	COUNTY	ACQUIRED	CONTACT	PHONE #
Shorewood Hills	Village	MAINTENANCE	Dane	2008	Cokie Albrecht	608-267-2680
Madison	Town	FULL VALUE MAINTENANCE	Dane	2008	Renee Schwass	608-210-7260
McFarland	Village	FULL VALUE MAINTENANCE	Dane	2009	Tracey Berman	608-838-3153
Monona	City	FULL VALUE MAINTENANCE	Dane	2005	Joan Andrusz	608-222-2525
Oregon	Village	FULL VALUE MAINTENANCE	Dane	2004	Peggy Haag	608-835-3118
Pleasant Springs	Town	FULL VALUE MAINTENANCE	Dane	2002	Cassandra Suettinger	608-873-3063
Stoughton	City	FULL VALUE MAINTENANCE	Dane	2002	Lana Kropf	608-646-0423
Perry	Town	MARKET REVALUATION	Dane	2006	Mary Price	608-832-6877
Albion	Town	MAINTENANCE	Dane	2009	Julie Hanewall	608-884-8974
Berry	Town	MAINTENANCE	Dane	2003	Brenda Kahl	608-767-4152
Blooming Grove	Town	MAINTENANCE	Dane	2003	Mike Wolf	608-223-1104
Blue Mounds	Village	MAINTENANCE	Dane	2009	Mary Jo Michek	608-437-5197
Blue Mounds	Town	MAINTENANCE	Dane	2011	Helen Kahl	608-437-8722
Burke	Town	MARKET REVALUATION	Dane	2013	Brenda Ayers	608-825-8420
Cross Plains	Town	MAINTENANCE	Dane	2008	Ann Herger	608-798-0189
Deerfield	Town	MAINTENANCE	Dane	2007	Kim Grob	608-764-2608
Mount Horeb	Village	MAINTENANCE	Dane	2007	Cheryl Sutter	608-437-6884
Primrose	Town	MAINTENANCE	Dane	2012	Ruth Hansen	608-832-8056
Cambridge	Village	FULL REVALUATION	Dane/Jefferson	2001	Lisa Moen	608-423-3712
Edgerton	City	FULL VALUE MAINTENANCE	Dane/Rock	2007	Cindy Hegglund	608-884-3341
Dayton	Town	FULL REVALUATION	Waupaca	2015	Judy Suhs	715-258-0930
Portage	City	FULL VALUE MAINTENANCE	Columbia	2001	Marie Moe	608-742-2176
Beaver Dam	City	FULL VALUE MAINTENANCE	Dodge	2001	John Somers	920-887-4600
Jefferson	City	FULL VALUE MAINTENANCE	Jefferson	2006	Tanya Stewart	920-674-7700
Whitewater	City	FULL VALUE MAINTENANCE	Jefferson/Walworth	2008	Michele Smith	262-473-0500
Cudahy	City	FULL VALUE MAINTENANCE	Milwaukee	2015	Dennis Broderick	414-769-2204
Shorewood	Village	FULL VALUE MAINTENANCE	Milwaukee	2014	Chris Swartz	414-847-2701
Bayside	Village	FULL VALUE MAINTENANCE	Milwaukee/Ozaukee	2006	Lynn Galyardt	414-351-8812
Burlington	City	FULL VALUE MAINTENANCE	Racine / Walworth	2012	Diahnn Halbach	262-342-1171
Milton	City	FULL VALUE MAINTENANCE	Rock	2004	Elena Hilby	608-868-6900
Elkhorn	City	FULL VALUE MAINTENANCE	Walworth	2001	Sam Tapson	262-723-2219
Lake Geneva	City	FULL VALUE MAINTENANCE	Walworth	2005	Dennis Jordan	262-248-3673
Hartford	City	FULL VALUE MAINTENANCE	Washington	2011	Lori Hetzel	262-673-8201
Caledonia	Town	MARKET REVALUATION	Columbia	2009	Stephanie Brensike	608-742-4801
Friesland	Village	MARKET REVALUATION	Columbia	2006	Marcia Dykstra	920-348-5156
Pardeeville	Village	MARKET REVALUATION	Columbia	2002	Brandon Bledsoe	608-429-3121
Fox Lake	Town	MARKET REVALUATION	Dodge	2006	Mason Zantow	920-928-3573
Sullivan	Village	MARKET REVALUATION	Jefferson	2002	Heather Rupnow	262-593-2388
Twin Lakes	Village	MARKET REVALUATION	Kenosha	2014	Jennifer Frederick	262-877-2858
Delavan	Town	MARKET REVALUATION	Walworth	2012	John Olson	262-728-3471
De Pere	City	MAINTENANCE	Brown	2005	Dave Hongisto	920-339-4053
Brillion	City	MAINTENANCE	Calumet	2002	Lori Gosz	920-756-2250
Chilton	City	MAINTENANCE	Calumet	2002	Helen Schmidkofer	920-849-2451
Harrison	Town	MAINTENANCE	Calumet	2007	Travis Parish	920-989-1062
Harrison	Village	MAINTENANCE	Calumet	2013	Travis Parish	920-989-1062
Lodi	City	MAINTENANCE	Columbia	2005	Kathy Clark	608-592-3247
Lodi	Town	MAINTENANCE	Columbia	2009	April Goeske	608-592-4868
Cambria	Village	MAINTENANCE	Columbia	2002	Lois Frank	920-348-5443
Courtland	Town	MAINTENANCE	Columbia	2007	Kate Raley	920-992-6585
Dekorra	Town	MAINTENANCE	Columbia	2009	Vicki Auck	608-635-2014
Poynette	Village	MAINTENANCE	Columbia	2006	Sue Kilen	608-635-2122
Randolph	Town	MAINTENANCE	Columbia	2006	Rod Kok	920-348-5597
Prairie du Chien	City	MAINTENANCE	Crawford	2012	Barb Elvert	608-326-6406
Iron Ridge	Village	MAINTENANCE	Dodge	2010	Arlette Lindert	920-387-3975
Eldorado	Town	MAINTENANCE	Fond Du Lac	2010	Lori Linger	920-872-5071
Lancaster	City	MAINTENANCE	Grant	2009	Dave Kurihara	608-723-4246
Platteville	City	MAINTENANCE	Grant	2012	Jan Martin	608-348-1821
Brodhead	City	MAINTENANCE	Green/Rock	2009	Teresa Withee	608-897-4018
Upham	Town	MAINTENANCE	Langlade	2002	Leah Antoniewicz	715-275-4229
Cleveland	Village	MAINTENANCE	Manitowoc	2006	Stacy Grunwald	920-693-8181
Kronenwetter	Village	MAINTENANCE	Marathon	2012	Cindy Falkowski	715-693-4200
Marathon	Town	MAINTENANCE	Marathon	2001	Kelley Blume	715-443-3082
Menominee	Town	MAINTENANCE	Menominee	2009	Ruth Waupoose	715-799-3311
Brown Deer	Village	MAINTENANCE	Milwaukee	2016	Jill Kenda-Lubetski	414-371-3050
Glendale	City	MAINTENANCE	Milwaukee	2009	John Fuchs	414-257-1800
Pine Lake	Town	MAINTENANCE	Oneida	2006	Cindy Skinner	715-362-6071
Bovina	Town	MAINTENANCE	Outagamie	2011	Chuck Pluger	920-986-3224
Buchanan	Town	MAINTENANCE	Outagamie	2009	Joel Gregozeski	920-734-8599
Combined Locks	Village	MAINTENANCE	Outagamie	2006	Racquel Giese	920-788-7740
Dale	Town	MAINTENANCE	Outagamie	2007	Jennifer DeZeeuw	920-779-4609
Kimberly	Village	MAINTENANCE	Outagamie	2008	Adam Hammatt	920-788-7500
Seymour	City	MAINTENANCE	Outagamie	2006	Susan Garsow	920-833-2209
Saukville	Village	MAINTENANCE	Ozaukee	2006	Dawn Wagner	262-284-9423
Prescott	City	MAINTENANCE	Pierce	2009	Jayne Brand	715-262-5544

ACCURATE APPRAISAL, LLC CURRENT CLIENTS

MUNICIPALITY	TYPE	JOB TYPE	COUNTY	ACQUIRED	CONTACT	PHONE #
Beloit	Town	MAINTENANCE	Rock	2004	Karry Devault	608-364-2980
Footville	Village	MAINTENANCE	Rock	2016	Jennifer Becker	608-876-6116
Fulton	Town	MAINTENANCE	Rock	2006	Connie Zimmerman	608-868-4103
Rock	Town	MAINTENANCE	Rock	2009	Deb Bennett	608-362-0598
Union	Town	MAINTENANCE	Rock	2005	Bridgit Larsen	608-882-5323
Prairie du Sac	Village	MAINTENANCE	Sauk	2016	Niki Conway	608-643-2421
West Baraboo	Village	MAINTENANCE	Sauk	2015	Kathy Goerks	608-356-2516
Angelica	Town	MAINTENANCE	Shawano	2008	Janet Powers	920-822-5554
Green Valley	Town	MAINTENANCE	Shawano	2006	Janalee Jenerou	715-745-2699
Wescott	Town	MAINTENANCE	Shawano	2009	Angela Vreezeke	715-526-9755
Sheboygan Falls	Town	MAINTENANCE	Sheboygan	2009	Jenny Meyer	920-467-1922
Darien	Town	MAINTENANCE	Walworth	2009	Marilyn Larson	262-882-3393
Fontana	Village	MAINTENANCE	Walworth	2005	Dennis Martin	262-275-6136
Geneva	Town	MAINTENANCE	Walworth	2009	Debra Kirch	262-248-8497
Richmond	Town	MAINTENANCE	Walworth	2006	Barb Ceas	608-883-2017
Spring Prairie	Town	MAINTENANCE	Walworth	2009	Debbie Collins	262-642-7477
Sugar Creek	Town	MAINTENANCE	Walworth	2002	Diane Boyd	262-742-3383
Walworth	Village	MAINTENANCE	Walworth	2007	Donna Schut	262-275-2127
Germantown	Village	MAINTENANCE	Washington	2009	Dave Schornack	262-250-4750
Hartland	Village	MAINTENANCE	Waukesha	2007	Connie Casper	262-367-2714
Rose	Town	MAINTENANCE	Waushara	2005	Lois Kolka	920-622-3765
Menasha	Town	MAINTENANCE	Winnebago	2015	Karen Backman	920-720-7149

IMPORTANT INFORMATION

1. Telephone Numbers

- 920-749-8098
- 800-770-3927

2. Fax Number

- 920-749-8099

3. E-Mail Address

- question@accurateassessor.com

4. Mailing Address

- PO Box 415, Menasha, WI 54952
- 1428 Midway Rd., Menasha, WI 54952

5. Website

- www.accurateassessor.com

2018 Time Line for Full Revaluation

January 2018 – Check for any new construction

June/July 2018 – Perform the initial physical inspection & the certified letter inspections

August 2018 – Open book will during this month

September 2018 – Board of Review will be held this month.

Open Book and Board dates can be adjusted.

James Danielson

Employment

Accurate Appraisal LLC., Appleton, WI.

Member (June 2000 – Present)

- Largest Current Projects: City of Beaver Dam, City of Portage, City of Lake Geneva, City of Stoughton, City of Glendale, City of Brodhead, City of Brillion, City of Chilton, City of Jefferson, City of Elkhorn, City of Monona, City of Edgerton, City of Milton, City of Lodi, City of De Pere, City of Lancaster, City of Prescott, Village of Saukville, Village of Fontana, Village of Bayside, Village of Hartland, Village of Germantown, Village of Kimberly, Village of Mount Horeb, Village of Cambridge, Village of Sullivan, Village of Pardeeville, Village of Cambria, Village of Oregon, Village of Blue Mounds, Village of Cleveland, Village of Combined Locks, Village of Friesland, Village of Poynette, Village of Walworth, Village of Shorewood Hills.
- Company is Statutory Assessor for 97 municipalities statewide.
- Relegating and managing an assessor crew.
- Residential and commercial valuing.
- Open Book and Board of Review Sessions.
- Developed software program.
- Experienced in GVS, Microsolve, and PC Market Drive software.

Education

University of Wisconsin – Stevens Point, Bachelor of Science

Major: Business Administration.

Minor: Economics

Assessor Certification

State of Wisconsin Certified Level 2 Assessor # JQG020214D