

Municipal Tax Services LLC

PROPOSAL

IN RESPONSE TO REQUEST FOR PROPOSALS No 888

ENTITLED:

MOTOR VEHICLE TAX COMPLIANCE

Submitted By: Carl M. DeProfio, Managing Member
Municipal Tax Services LLC
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TABLE OF CONTENTS

<u>Specified Sequence Number</u>	<u>Page Number</u>
1 – 6.....	1
7 – 9.....	2
10 –13.....	6
Appendix A <i>Personnel and Employment Policies</i>	10
Appendix B <i>Insurance</i>	16
Appendix C <i>Cost Schedule</i>	18
Appendix D <i>Acceptance, Authorization, Warrants and Forms</i>	19
 <i>Attachments - Contractor's Statement</i>	
<i>Non-Collusion Affidavit</i>	
<i>City of Stamford State of Connecticut Contractor Verification</i>	
<i>compliance Affidavit</i>	
<i>Certification as to Contract Signatory for Limited Liability Companies</i>	
<i>Proposer Information and Acknowledgement Form</i>	
<i>Department of the Treasury Internal Revenue Service Form W-9</i>	
<i>Commission on Human Rights and opportunities Contract Compliance</i>	
<i>Regulations – Notice to Bidders Form</i>	

Profile of Proposer

1. Municipal Tax Services LLC (“MTS”) is fully insured and the Managing Member, Carl M. DeProfio, is a licensed Private Investigator in Connecticut. A Private Detective license is required to provide the type of service requested by the City of Stamford (“City” or “Stamford”). Connecticut General Statute (“CGS”) 29-153 states in part that “No person shall engage in the business of or furnish detective or investigative services without first obtaining a license from the Commissioner of Public Safety.” Since this service requires a systematic inquiry into individuals and business entities and the accumulation of information as a result of those inquiries, it is considered an investigative service.
2. MTS is a local firm which was established for the purpose of providing Connecticut municipalities, like Stamford, with the experience and resources necessary to conduct specialized investigations as they relate to the assessment of motor vehicles and other personal property.
3. MTS is located at 120 Long Hill Cross Road, Shelton, Connecticut 06484.
4. MTS has never been the subject of any professional disciplinary action by any government or professional organization.
5. MTS has successfully provided similar services to other municipalities in Connecticut, among them: the City of West Haven, the City of Danbury, the City of Bridgeport, the City of Waterbury, the City of New Haven, the City of Hartford, the Town of Hamden, the Town of North Haven, the Town of Bethel and the Town of New Milford. In addition, MTS is currently under contract with the City of Stamford and has been since January of 2019 in providing this service.
6. All services provided to Stamford will be performed by professionals in our Shelton office. Our telephone number is (203) 402-0780 or we can be reached toll free at (866) 703-0780. Mr. DeProfio is the Managing Member of MTS and is in charge of the daily operations of our office.

In his capacity as Managing Member, Mr. DeProfio will be Stamford’s primary contact and will be responsible for the overall engagement with the City. Mr. DeProfio will be available to the City for the term of this engagement and, if necessary, after its completion. Mr. DeProfio is committed to support the services provided by MTS for as long as the City requires, including beyond the contract term. Additionally, Stamford will have access to all MTS professionals to assist with any questions that arise. For example, our Information Technology Specialist and Data Manager can be a valuable resource to the City’s Information Technology personnel to ensure all electronic information is processed as accurately and efficiently as possible.

7. MTS's client list is the same as articulated in Item #5 above. MTS has been providing services since its inception in 2005.

8. Personnel and Employment Policies

MTS is committed to provide Stamford high quality personnel who have the ability to process the data that is acquired, make informed decisions regarding that data, have the knowledge and ability to articulate the applicable laws and intelligently respond to questions from potential taxpayers or their legal representatives.

Every employee is screened and a criminal background check is conducted. Prior to hiring, every employee is required to sign non-disclosure, non-compete and confidentiality agreements with MTS. They must also sign a "Certification of Tax Compliance" affidavit attesting that they are current and will remain current, with all federal, state and local tax obligations. Any failure to do so will result in their termination of employment with MTS. They are provided study guides relevant to the applicable statutes utilized, trained and must pass a written examination prior to interacting with prospective taxpayers.

MTS's organizational structure consists of two members/owners, an office manager, six full-time employees, four part-time employees, a computer technology consultant and an independent contractor. Of our eleven employees and consultant, four are female and we, as a company, are committed to Affirmative Action policies. MTS also utilizes the services of a Hispanic independent contractor to assist in verifying raw data. He is a former, full time, registered employee of the company who has relocated outside of Connecticut. See "Appendix A" for further information on these individuals.

9. *Proposed Approach*

We have established a program that ensures maximum benefit for the City. This four phased approach ensures the City will receive the maximum benefit possible for our services during the term of this engagement. This approach remains flexible and will be discussed with the Assessor before any services begin.

Phase I - Establish Criteria and Discuss Approach

Motor Vehicles and Personal Property

1. Meet with the appropriate city officials to ascertain specific responsibilities with regard to the program.
2. Meet with the assessor to ascertain his application of the specific laws he is empowered to enforce.
3. Establish the criteria the assessor wishes this firm to adhere to and completely cover all aspects of the process.

4. If needed, establish and conduct training sessions for those city employees who interact directly with the taxpayers. This typically involves only those employees who work in the offices of the Assessor and the Tax Collector.
5. Instruction from MTS's Information Technology Specialist in the proper access to and use of the City's file information posted on the company's File Transfer Protocol (FTP) site.

Phase II - Explanation of Discovery Process

1. Deployment of agents into Stamford to acquire the raw data necessary to begin the process.
2. Entry of the data into our electronic processing system.
3. Obtain owner information for the motor vehicles identified.
4. Obtain supporting evidence to determine the residence of the owners of the suspect motor vehicles.
5. Compilation of supporting evidence to support a prima facie case regarding assessment of the suspect vehicles.

Phase III - Explanation of Further Investigative Process

1. Compose and prepare "First Letter" correspondence between the Assessor and the potential taxpayer.
2. Receive all telephonic and written correspondence from the potential taxpayer or their legal representative and investigate all facts presented in rebuttal arguments.
3. Prepare rebuttal responses for the Assessor's approval.
4. Maintain all files, electronic and written, generated and received with respect to each case.
5. Maintain close contact with the Assessor, or his representative, to determine taxability of all vehicles identified during our investigation.

Phase IV - Resulting Action and Support

Once taxability has been determined we will compile all required assessment data for motor vehicles and submit that data in an electronic format compatible with the City's assessment and collection software.

Support of all investigative work performed. This includes but is not limited to providing testimony at all levels of the appeals process, providing address updates of property owners and preserving and maintaining each file, as required by the City, for future reference by the Assessor, Corporation Counsel, other City Officials, or the City's contracted collection agency.

Recommendation

Based on the analysis of the data gathered over the past four (4) years in Stamford, we recommend that the City should no longer pursue vehicles with a combined assessed value of \$5,000 or less. From November 1, 2021 through October 31, 2022 we pursued over 300 vehicles on your behalf that were either at, or below, this threshold. With the average vehicle being assessed for two (2) tax years, and analysis of cases established within the past year, the city would forgo approximately \$80,000 in gross revenue collected – not including applicable expenses – assuming all accounts were collected in full on an annual basis.

Determination of the assessed value can only be made after the completion of Phases II described in section 9 above.

Other Information

MTS was formed on July 14, 2005. Since our inception, we have focused all of our efforts on working with Connecticut municipalities by investigating motor vehicles and businesses whose property values are not included in their respective Grand Lists. Carl M. DeProfio is the founder and managing member of MTS. He has devoted the last 25 years of his career providing this service to Connecticut municipalities. Mr. DeProfio established MTS with the purpose of providing local governments with the experience and resources necessary to conduct specialized investigations as they relate to the assessment of motor vehicles and other personal property.

Our program is designed to assist the assessor and adhere to his individual criterion. Should the assessor see fit to change it at any time, MTS offers the flexibility and experience to respond to this change. In short, the assessor is in control and his individual application of the law is the standard under which we perform our service.

Our process of identifying the potential taxpayer and acquiring the necessary information to pursue assessment of their motor vehicles or personal property increases the speed at which we function and enhances the degree of accuracy of our investigation. Our process ensures that Stamford will realize the maximum benefit possible during the term of our engagement.

Summary of Relevant Experience

MTS has successfully provided motor vehicle investigative services to the following municipalities:

1. West Haven
2. New Haven
3. Bridgeport

4. Waterbury
5. Stamford
6. Hartford
7. Danbury
8. Hamden
9. North Haven
10. New Milford
11. Bethel

Our success in these municipalities can be clearly documented from the inception of our contracts to the present. In the past three (3) years MTS has managed successful programs in Waterbury, Stamford, Hartford, New Milford and Bethel.

Insurance

MTS carries Commercial General Liability, Professional Liability, Workers Compensation and Hired not owned Auto Insurance. (See Appendix B for particulars and coverage.

Services Expected of the City

The City is expected to support the program during the term of the engagement by providing the following:

1. Continue to supply electronic Copies of the City's Real Estate, Personal Property and Motor Vehicle Grand Lists generated during the contract period.
2. The Assessor's office is expected to continue to be linked with the CT and NY DMV's enabling access for data required by MTS to perform the stated services.
3. Assist us in the record retention requirements of the City.
4. All employees of the City who directly interact with the taxpayers, will continue to support the program and the efforts of the Assessor.
5. Timely payments for the services rendered.

Additional Information

Our "state of the art" data management system enables us to accumulate and process information quickly and efficiently in a secure and stable environment. This enables the assessor to make an accurate and informed decision regarding assessments faster and more efficiently.

The data input from the "Securewatch24" system is performed by our data management specialist. The system automatically produces documents by use of a data source control function programmed into the system. This increase in efficiency and speed results in the influx of tax revenue faster and in greater amounts for Stamford.

Our system provides up to date statistics which are available to the assessor at any moment in time. As adjustments are made, the statistics are updated automatically and provide breakdowns into various categories of interest to the assessor. The system will accommodate any category of vehicle or other personal property and will instantly reveal all statistics akin to that category. This statistical analysis feature built into our system is of great interest and significant value to any tax assessor.

Our office is located in Shelton Connecticut near CT RT. 8 with easy access to the Merritt & Wilbur Cross Parkways and Interstate Highways 84 and 95. Our office is located in a modern, steel and masonry constructed building, thus reducing the risk of environmental and fire hazards. We are well equipped with anti-intrusion alarms serviced and monitored from a Central Station by ADT Security Services, Inc.

10. MTS has always contracted with municipalities on a contingency fee basis. However, based on an analysis of the services provided for Stamford over the past four (4) years, including data gathering, data analysis, investigations, and all the support services involved in each case, the hourly rate for this RFP would be \$135.⁰⁰. An invoice will be supplied to the City on a monthly basis and payment to MTS would be no later than 30 days from the date of the invoice. (Further explained in Appendix “C” of this proposal)
11. Any special requests would be charged the agreed upon hourly rate.
12. It is clear that Stamford is seeking a service provider who possess specific qualifications:
 - (1) Experience and expertise in regard to providing the types of or similar services outlined in the Scope of Services in the RFP.
 - (2) A proven track record in providing these types of similar services for municipal governments and
 - (3) Knowledge of federal and state laws and regulations governing the services outlined in the Scope of Services.
 - (4) Having serviced the City of Stamford since January 11, 2019, MTS has an integral knowledge of the city borders. Having traversed every street in the city, MTS is acutely aware of its geography and the areas of concentration for this type of program. Additionally we have a working knowledge of the Assessor’s criteria and have an excellent working relationship with his staff.
13. As you continue to read our proposal, we are confident you will agree that MTS satisfies each of your requirements and is the firm best qualified for this assignment.

MTS will continue to distinguish its service to Stamford by providing responsiveness and value that will exceed your expectations. We believe choosing MTS makes business sense for several reasons:

- We have the right team to meet your needs.

- Our technology is state of the art which will allow us to maximize the benefit the City realizes during the term of the engagement.
- We will continue to emphasize communication with the City's Assessor's Office to ensure that all of Stamford's expectations are met and that MTS is providing the most value to the City.

The Right Team To Meet Your Needs

By choosing MTS you will gain a team of professionals (see Appendix A) with a proven record of serving cities like Stamford. As explained more fully in Appendix A, the management and staff of MTS has experience in working with existing laws pertinent to the assessment of taxes relating to motor vehicles and other personal property. We are committed to the training of our staff as new statutory provisions are put in place or new legislation is enacted. Our field agents are responsible, professional and work well with local law enforcement officials when the need arises.

Technology and Maximizing Benefit

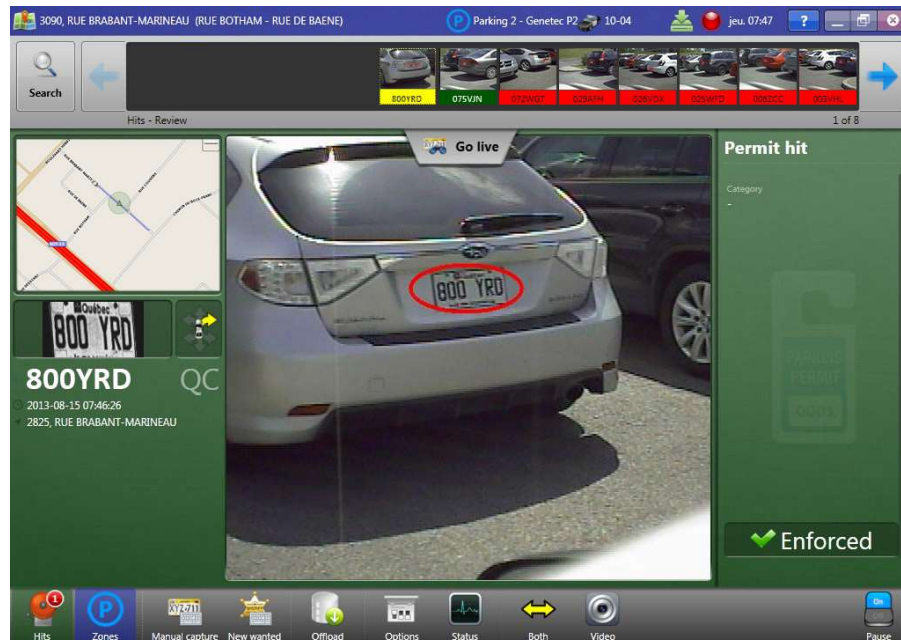
Our process of gathering the raw data, identifying potential taxpayers and acquiring the necessary information to pursue assessment of their motor vehicle(s) increases the speed at which we function, enhances the degree of accuracy of our investigation and significantly increases the capacity of information we can process in a short period of time. This will allow Stamford to realize the maximum benefit possible during the contract term.

Our field agents acquire data via the patented Securewatch24 system. In addition, we also use physical observation and voice recorded information. The AutoVu™ automatic license plate recognition (ALPR) system automates license plate reading and identification, making it easier for law enforcement and for municipal and commercial organizations to locate vehicles of interest and enforce existing laws. Designed for both fixed and mobile installations, the Securewatch24 system is ideal for a variety of applications and entities. MTS will utilize Securewatch24's mobile system to compile data on motor vehicles located within the boundaries of Stamford.

The Securewatch24 AutoVu™ system is integrated with a SharpX camera which is mounted on our agent's vehicle. The SharpX is an IP-based ALPR camera designed for mobile application. With its small form factor, high resolution, and integrated illumination, the SharpX captures more license plates in a variety of conditions and at high speeds. Supporting up to four cameras connected to a single external processing unit, the SharpX ensures maximum coverage and the highest degree of accuracy in parked and on the move applications.



SecureWatch24's patented system incorporates a GPS platform which automatically records the date, time, and location of the vehicle. The system displays the images captured on the agent's laptop computer and the data is stored in an external database for later use by the agent.



The AutoVu™ reads are uploaded into our system electronically and the voice recorded information is entered by the agent who acquired the data thus reducing the possibility of errors. Once entered, the data is processed through our secured

data management system. This system was developed by MTS for the purpose of expediting the processing of the information gathered during our investigation. The process efficiencies we have perfected allow us to deliver the information needed to recommend tax assessments resulting from our service at an increased volume in a shorter amount of time. For example, during our contract terms in the municipalities identified we have established over 70,000 cases, identified over 64,000 vehicles for assessment representing over 115,000 tax years with a net assessed value in excess of \$800 million.

Communication

MTS's program has been designed to assist the individual assessor and is tailored to meet his specific criterion. That is, we understand that individual assessors have different philosophies in how they apply the law. Our program has the flexibility so that it can be effective and meet the needs of the individual assessor. We will continue to encourage meetings with city officials to assess the progress of the program and provide up to date statistics as requested. Based on our current engagement we are confident that we understand your assessor's application of the law regarding the assessment of property tax on motor vehicles and personal property and will continue to work with him to keep the most effective program in place for Stamford.

Additionally, since we routinely amass and manage information of a proprietary and confidential nature, MTS is fully insured and meets or exceeds the limits of liability normally requested by a municipality. See Appendix "B" for additional information on our current insurance coverage.

APPENDIX A

Personnel and Employment Policies

MTS is committed to provide Stamford high quality personnel which have the ability to process the data that is acquired, make informed decisions regarding that data, have the knowledge and ability to articulate the applicable laws and intelligently respond to questions from potential taxpayers or their legal representatives.

Every employee is screened and a criminal background check is conducted. Prior to hiring, every employee is required to sign non-disclosure, non-compete and confidentiality agreements with MTS. They must also sign a “Certification of Tax Compliance” affidavit attesting that they are current and will remain current, with all federal, state and local tax obligations. Any failure to do so will result in their termination of employment with MTS. They are provided study guides relevant to the applicable statutes utilized, trained and must pass a written examination prior to interacting with prospective taxpayers.

MTS’s organizational structure consists of two members/owners, six full-time employees, four part time employees, a computer technology consultant and independent contractors. Of our ten employees, a computer systems security consultant and an independent contractor who is a past employee of MTS, three are female and our independent contractor is Hispanic. We, as a company, are committed to Affirmative Action policies.

Members/Owners

Carl M. DeProfio – Managing Member & Principal Owner

Mr. DeProfio is the founding member of MTS and manages its operations. He will be Stamford’s primary contact and will be responsible for MTS’s obligations under any contract awarded to it by the City. He is a graduate of Sacred Heart University and holds a BA in Sociology. Mr. DeProfio has over 45 years of experience as an investigator. He is a retired Detective of the Connecticut State Police where he served in various investigative capacities over a 22 year career. Since his retirement in 1992 he has headed his own private investigation agency and so possesses a Private Detective Corporation license. Mr. DeProfio has devoted the last 25 years of his career to investigations relative to tax assessment matters directly related to motor vehicle and business personal property tax assessments. Since his retirement from the State Police, he has rendered expert testimony in “Proper Investigative Techniques and Procedure” in both State and Federal Courts resulting in favorable verdicts for the plaintiffs. In addition, he has worked closely with tax assessors throughout the state and has been called upon by Corporation Counsel in Waterbury to provide testimony with respect to such cases. He possesses a vast knowledge of the laws directly relating to motor vehicle assessments as well as an acute and integral knowledge of the statutory criteria for assessments of every type of vehicle for which the law applies.

Carl R. DeProfio - Member & Minority Owner

Mr. DeProfio is a member of MTS. He is a licensed CPA in Connecticut. He earned his Bachelor of Science Degree in Accounting from Southern Connecticut State University and his Master of Science Degree in taxation from the University of New Haven. Mr. DeProfio manages the finances of MTS. He is responsible for assuring that MTS is in compliance with all federal, state, and local tax laws.

Personnel

Steven Posick

Mr. Posick is our network and systems security consultant. Mr. Posick has been under contract with our firm since its inception. He attended the University of New Haven and is the architect of our network and systems security structure. Mr. Posick is a Broadcast Media Engineer and possesses the unique and highly coveted Computer Information Security Systems Professional (CISSP) designation. He has assisted Federal Law enforcement officials in Homeland Security issues.

Andrew Schilkowski

Mr. Schilkowski is a full time employee and the Office Manager. He joined MTS on August 1, 2005 as our Information Technology Specialist and Data Manager. He is responsible for maintaining our information technology system and the processing of all electronic data. He has created our data preservation system to ensure no data can be lost or destroyed under any circumstances. Mr. Schilkowski is extremely proficient in his knowledge and understanding of the property tax laws relating to motor vehicle assessment and taxation. He knowledgeably interacts with tax assessors, taxpayers, their legal representatives and other municipal officials while servicing municipal contracts awarded to MTS. This knowledge allows him to understand precisely what is required from an information technology perspective. In addition he trains office staff in proper investigative methods relating to tax assessments.

He is a graduate of Eastern Connecticut State University where he earned a Bachelor of Science Degree in Computer Science. He was a Dean's List student and an ODK National Leadership Honor Society Inductee in his senior year. He was also the recipient of a scholarship award in Computer Science from TranSwitch Corporation where he interned while completing his undergraduate degree requirements.

Office and Field Staff

Laura O'Toole

Mrs. O'Toole is a part time employee. She joined MTS on August 1, 2005 as our File Control Manager. Her duties and responsibilities included management of our vast filing system consisting of over 60,000 files. Mrs. O'Toole has completed our in-house training program and now also serves MTS as a paralegal consultant. She provides potential taxpayers with explanations regarding the laws pertaining to assessment of motor vehicles and guidance in the submission of proper documents should they care to submit rebuttal arguments in response to correspondence from the Office of the Assessor. Mrs. O'Toole also provides data verification services for MTS.

Mrs. O'Toole graduated Cum Laude from the University of Bridgeport where she earned a Bachelor of Arts Degree in Social Science. She was a Dean's List student and National Honor Society member. She was also the recipient of a scholarship award from the university. Upon graduation she attended Naugatuck Valley Community College with a course focus on paralegal studies. She subsequently received certification as a Paralegal in the State of Connecticut and currently works full time as a paralegal in a prestigious Law Firm in Connecticut.

Julie DeProfio

Mrs. DeProfio joined MTS on July 15, 2005 as our Chief Financial Officer. She is responsible for all aspects of the financial record keeping of MTS. Mrs. DeProfio is a graduate of Western Connecticut State University where she earned a Bachelor of Science Degree in Accounting. She has served as an auditor with the Connecticut Credit Union League, served for two years as the Controller for the Greenwich Teachers Federal Credit Union and for 8 years as the Vice President and Controller for the Stamford Federal Credit Union.

John O'Toole

Mr. O'Toole is a part time employee. He joined MTS on June 18, 2006 as a Client Service Specialist and Field Agent. He completed our in-house training program and operates under the direction of Mr. DeProfio. His duties and responsibilities included acquiring the raw data necessary to initiate an investigation, assisting with our file management system, and interaction with potential taxpayers by providing explanations regarding the laws pertaining to assessment of motor vehicles and guidance in the submission of proper documents.

Mr. O'Toole is a graduate of Central Connecticut State University where he received a Baccalaureate degree in secondary education and possesses a 5th year teaching degree. Mr. O'Toole also received a Master of Science degree in Education from the Sierra Nevada

College. He is currently employed full time as a secondary schoolteacher at a local Connecticut High School.

Mr. O'Toole continues to provide service to MTS on a part time basis as a Field Agent and data verifier.

Stephen Schilkowski

Mr. Schilkowski is a full time employee. He joined MTS on September 10, 2014. and serves as a Client Service Specialist. He completed our in-house training program and operates under the direction of Mr. DeProfio. His duties and responsibilities include assisting with our file management system, and interaction with potential taxpayers by providing explanations regarding the laws pertaining to assessment of motor vehicles and guidance in the submission of proper documents as well as reviewing document submissions and preparing rebuttal response. He also serves as our chief research specialist concentrating on gathering and evaluating information from various sources to establish evidence sufficient to establish and pursue various tax years on behalf of our contracted municipalities.

He is a graduate of Shelton High School and New York University where he obtained a Baccalaureate Degree in Political Science with a minor in Philosophy. Mr. Schilkowski is bilingual and speaks both English and Spanish.

Brian Bertanza

Mr. Bertanza is a full time employee. He joined MTS on May 25, 2014 as a Field Agent. He completed our in-house training program and operates under the direction of Mr. DeProfio. His duties and responsibilities are acquiring raw and accurate data necessary to initiate an investigation. Mr. Bertanza is a graduate of Andrew Warde High School of Fairfield Connecticut.

Kyle Bertanza

Mr. Bertanza is a full time employee. He joined MTS on March 30, 2015 and served as a Client Service Specialist. He completed our in-house training program and operates under the direction of Mr. DeProfio. His duties and responsibilities include assisting with our file management system, and as a field agent. He is a graduate of Emmett O'Brien High School and attended the University of Hartford in Hartford, CT with a focus in Communications and Criminal Justice.

Stephen Gifford

Mr. Gifford is a full time employee. He joined MTS on February 28, 2019 and serves as a Client Service Specialist. He completed our in-house training program and operates under the direction of Mr. DeProfio. His duties and responsibilities include assisting with our file management system, and interaction with potential taxpayers by providing explanations regarding the laws pertaining to assessment of motor vehicles and guidance in the submission of proper documents as well as reviewing document submissions and preparing rebuttal response.

He is a graduate of Oxford High School in Oxford Massachusetts and attended Quinsigamond Community College in Worcester, MA with a focus in Criminal Justice. Prior to joining MTS he spent eight (8) years as an investigative analyst and a pre-employment screening supervisor at Security Services of CT.

Nicholas DeLuise

Mr. DeLuise is a full time employee. He joined MTS on September 5, 2021 and serves as a Client Service Specialist. He completed our in-house training program and operates under the direction of Mr. DeProfio. His duties and responsibilities include assisting with our file management system, and interaction with potential taxpayers by providing explanations regarding the laws pertaining to assessment of motor vehicles and guidance in the submission of proper documents as well as reviewing document submissions and preparing rebuttal response.

He is a graduate of Shelton High School and Housatonic Community College where he earned an Associate of Science degree in Business Administration. Mr. DeLuise is bilingual and speaks both English and Spanish.

Jennifer Sanford

Ms. Sanford is a part-time employee. She joined MTS on April 12, 2020 as a full time employee relocating to Connecticut from Tennessee. Ms. Sanford converted to a part-time employee on April 23, 2022. She completed our in-house training program and operates under the direction of Mr. DeProfio. Her duties and responsibilities include assisting with our file management system, and interaction with potential taxpayers by providing explanations regarding the laws pertaining to assessment of motor vehicles and guidance in the submission of proper documents. Recently she has also assisted in our data verification process.

She is a graduate of Ballston Spa High School in Ballston Spa NY. Ms. Sanford worked as a customer service representative and data analyst for Verizon Wireless Communications for over 15 years.

Wilfredo Vega

Mr. Vega was a full time employee from November 19, 2007 to September 2016. He served as a Client Service Specialist and Field Agent. He is a graduate of Housatonic Community College with an Associate of Science degree in Accounting and has attended St. John's University in Jamaica, Queens N.Y. Mr. Vega is bilingual and fluent in both Spanish and English. He is proficient in his knowledge and understanding of the property tax laws relating to motor vehicle assessment and taxation. He was able to knowledgably interact with tax assessors, taxpayers, their legal representatives and other municipal officials while servicing municipal contracts awarded to MTS. In September 2016 Mr. Vega relocated to the State of Florida. Since that time he has assisted MTS as an independent Contractor performing data verification services.

Every employee past & present is registered with the Department of Emergency Services and Public Protection, Division of State Police and authorized to work under Mr. DeProfio's Private Detective Corporation license.

APPENDIX B INSURANCE

MTS maintains the following insurance of which the City of Stamford would be included as an additional insured:

A. Professional Liability Insurance

Professional Liability (also known as errors and omissions) – Insurance providing coverage to MTS in the amount of One Million (\$1,000,000.00) each claim and with an aggregate limit of two million (\$2,000,000.00) dollars.

B. Workers' Compensation Insurance

Adequate and statutory insurance to protect MTS from claims under Worker's Compensation Acts arising from or connected with the performance of its services under any contract. Currently our policy provides Employer Liability Insurance as follows:

- I. Bodily injury by accident: \$100,000 Each Accident
- II. Bodily injury by disease: \$ 100,000 Each Employee
- III. Bodily injury by disease: \$ 500,000 Policy Limit

C. Motor Vehicle Insurance

MTS maintains Commercial Automobile insurance covering the operation of all motor vehicles, including those owned, or not owned, hired or borrowed, used by the company in connection with municipal contracts, including supplements thereto in the following amounts:

Liability in the amount of \$1,000,000.00

Hired, not owned coverage in the amount of \$1,000,000.00

D. Commercial General Liability

MTS maintains General Liability Insurance providing the following coverage:

General Aggregate:	\$2,000,000.00
Products & Completed Operations Aggregate:	\$2,000,000.00
Personal & Advertising Injury-each occurrence:	\$1,000,000.00
Damage to Rented Premises-each occurrence:	\$500,000.00

Medical Expense (Any one person): \$5,000.00
Bodily Injury & Property Damage (Any one occurrence) \$1,000,000.00

E. Cancellation of Insurance

MTS will not suspend, reduce or cancel, either in coverage or in limits, any insurance provided for the purpose of carrying out the proposed contract with Stamford, to the extent that it is able, without 30 days prior written notice to the City.

F. Indemnification & Hold Harmless

MTS currently indemnifies contracted municipalities from any and all claims arising or resulting from the performance of services directly related to the contractor's involvement in any present or future agreement.

G. Waivers of Subrogation

All insurance required in this proposal shall contain waivers of subrogation against the City and its employees, agents and officers.

The City already has an updated Certificate of Insurance demonstrating the aforementioned requirements. As in the past, MTS will continue to update the City as policies are renewed.

APPENDIX C

COST SCHEDULE

1. Total compensation payable to MTS for providing the aforementioned service will be determined as follows:
 - A. Our fees for professional services rendered will be billed based upon the time incurred at an hourly rate of \$135.⁰⁰.
 - B. Our invoices will be payable within 30 days from the date of the invoice.
 - C. Compensation provided for under this agreement, would constitute full and complete payment for all costs assumed by MTS in performance of the proposed contract. This includes, but is not limited to, salaries, consultant fees, costs of materials and supplies, printing and reproduction, meetings, consultations, presentations, travel expenses, postage including mailings bearing the Assessor's letterhead relevant to MTS cases, telephone, clerical expenses, and all similar expenses.
 - D. No contract for employment is intended or implied via the proposed Agreement and no fringe benefits will be paid to MTS hereunder. It is intended that the relationship of MTS to Stamford be that of an independent contractor.
 - E. MTS will be responsible for the cost of advertising, soliciting, database management and other expenses under their direct control.
 - F. In the event the City fails to follow through with the terms of the agreement or opts out, after a fully executed agreement is in place, the City shall compensate MTS for hours supplied pursuant to the terms of the agreement as outlined in "A" through "B" above. The City will compensate MTS for all costs previously assumed by MTS, which are associated with performed services as specified in the "Scope of Services" section of this Proposal and outlined in "C" above .

APPENDIX D

Acceptance, Authorization, Warrants and Forms

Acceptance

MTS has reviewed and accepts the City's requirements, standards and compliance with all local ordinances as well as state and federal laws articulated in the RFP.

Authorization

MTS hereby authorizes the City of Stamford to verify any and all information presented in this proposal. To that end, the City may contact any person, firm or corporation to furnish any information requested by the City of Stamford to verify any of the recitals included in this response to the City's RFP.

Warrants

MTS warrants that this proposal is not made in connection with any other proposer and is in all respects fair and without collusion or fraud. MTS further represents and warrants that it did not participate in any part of the RFP development process, and had no knowledge of the specific contents of the RFP prior to its issuance, and that no agent, representative or employee of the City participated in the preparation of this proposal.

Additionally, the cost schedule has been arrived at independently without collusion, consultation, communication or agreement with any other Proposer or competitor and has not and will not be disclosed by this Proposer prior to opening, directly or indirectly, to any other Proposer or competitor. No attempt has been or will be made to induce any other person, partnership or corporation to submit or not submit a Proposal for the purpose of restricting competition.

MTS has had no contact with any other proposer or City official directly related to the RFP

Forms

The following forms included with the RFP are as follows:

- Contractors Statement.
- Non-Collusion Affidavit
- City of Stamford State of Connecticut Contractor Verification Compliance Affidavit
- Certification as to Contract Signatory for Limited Liability Companies
- Proposer Information and Acknowledgement Form
- Department of the Treasury Internal Revenue Service Form W-9
- Commission on Human Rights and opportunities Contract Compliance Regulations – Notice to Bidders Form

Contractor's Statement

Pursuant to Section 103.1 of the Stamford Code of Ordinances, I hereby provide the following:

If a joint venture, trustee, partnership, limited liability company or partnership, the names and addresses of all joint ventures, beneficiaries, partners or members:

Carl M. DeProfio - Managing Member

Carl R. DeProfio - Member

If a corporation, the names and addresses of all officers, and the names and addresses of all parties owning over 10% of its common stock or over 10% of its preferred stocks. If any of said stockholders is a holding corporation, the names and addresses of all persons owning a beneficial interest in over 10% of the common or preferred stock of said holding company.

N/A

The names and positions of all persons listed hereinabove who are elected or appointed officers or employees of the City of Stamford.

N/A

Name of Bidder/Proposer: Carl M. DeProfio

Signature of Bidder/Proposer: Carl M. DeProfio

Title: Managing Member

Company Name: Municipal Tax Services LLC

Address: P.O. Box 2254, Huntington, CT 08484-1254

Indicate if company submitting this proposal is: ☐ MBE ☐ WBE ☐ DBE

Non-Collusion Affidavit

The undersigned, having been duly sworn, affirms and says that to the best of his/her knowledge and belief:

1. The prices in this Proposal have been arrived at independently without collusion, consultation, communication, or agreement with any other Proposer or with any competitor for the purpose of restricting competition.
2. Unless otherwise required by law, the prices, which have been quoted in this Proposal, have not been knowingly disclosed by the Proposer and will not knowingly be disclosed by the Proposer prior to opening, directly or indirectly, to any other Proposer or to any competitor.
3. No attempt has been made or will be made by the Proposer to induce any other person, partnership or corporation to submit or not to submit a Proposal for the purpose of restricting competition.

Name of Proposer: Municipal Tax Servoces LLC

By: Carl M DeProfio

Print Name: Carl M. DeProfio

Title: Managing Member

ACKNOWLEDGMENT

STATE OF Connecticut

COUNTY OF Fairfield

ss. Shelton

Date: 11/1/22

Personally appeared CARL M. DeProfio as Manager/Member
of the above named firm, and attested that the foregoing statements are true and accurate to the
best of his/her knowledge and belief.

Therese Y Camille
Signature of Notary Public
My Commission Expires: 03/31/26

EFFECTIVE: 2/24/09



City of Stamford
State of Connecticut Contractor Verification (in accordance with Public Act 16-67)

Compliance Affidavit

I, the undersigned, personally and on behalf of Municipal Tax Services LLC having
(Contractor)
been duly sworn, affirm and say that I have read, understand and am in compliance with Public Act 16-67 Concerning the Disclosure of Certain Education Personnel Records, Criminal Penalties for Threatening in Educational Settings and the Exclusion of a Minor's Name from Summary Process Complaints, and that neither I nor said Contractor, to the best of my knowledge, is in possession of any information indicating a finding of abuse or neglect or sexual misconduct, or otherwise have knowledge of such a condition(s) for any employees working on the project identified in RFQ/RFP or Bid S- 888. Further, if I or said Contractor
(RFQ/RFP or Bid Number)
become aware of any information indicating such a finding, or otherwise gain knowledge of such a condition, I and/or said Contractor will immediately forward such information to the City of Stamford.

Contractor Name: Municipal Tax Services LLC
Street Address: 120 Long Hill Cross Road
City, State, Zip: Shelton, Connecticut 06484
Title of person completing this form: Managing Member
Signature: Carl M. DeProffio
Printed Name: Carl M. DeProffio
Date: NOVEMBER 1, 2022

ACKNOWLEDGMENT

STATE OF Connecticut
COUNTY OF Fairfield ss. Shelton
Date: 11/1/22

Personally appeared Carl M. DeProffio, as Managing Member
of the above named Contractor, and attested that the foregoing statements are true and accurate to the best of his/her knowledge and belief on behalf of himself and said Contractor.

Therese Y Camille
Signature of Notary Public

My Commission Expires: 03/31/2026



CERTIFICATION AS TO CONTRACT SIGNATORY
For Limited Liability Companies (LLCs)
(Effective 9/1/2011)

I, Carl M. DeProfio a Managing Member of Municipal Tax Services
(name of member or manager) (Member or Manager) LLC (name of LLC)

LLC, a limited liability company organized and existing under the laws of the State of Connecticut (hereinafter the "Company"), hereby certify that:

1. that Municipal Tax Services is run by Carl M. DeProfio - Managing Member
(name of LLC) (Members or Managers)

2. that Carl M. DeProfio is a Managing Member of Municipal Tax Services
(name of contact signatory) (Member/Manager) (name of LLC)

and

3. that as such Carl M. DeProfio is not prohibited from or
(name of Member/Manager who is contract signatory)
limited by the articles of organization from binding the LLC.

IN WITNESS HEREOF, the undersigned has affixed his/her signature this 3rd day of
November, 2022.

(LLC Seal)

(Circle this L.S. if there is no seal)

Carl M. DeProfio
Secretary (name of Secretary)
Managing Member

PROPOSER'S INFORMATION AND ACKNOWLEDGEMENT FORM

RFP No: 888

Date: November 2, 2022

Proposer's Name: Municipal Tax Services LLC

Street Address: 120 Long Hill Cross Road

Shelton Connecticut 06484
City State Zip

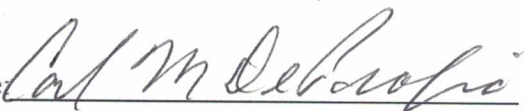
Business Telephone: 203-402-0780

Email: carld@municipaltaxservices.com

Unique Entity ID: HP2ESFL6R297 Tax Id. No.: 20-2879422

Indicate () (No) if company submitting this proposal is:

 MBE WBE DBE
(If yes, attach relevant certification)

Signature:  Date: November 2, 2022

Printed Name: Carl M. DeProfio

Title: Managing Member

Addenda Acknowledgement – check and note date of addendum

☐ Addenda No. 1	☐ Addenda No. 2
☐ Addenda No. 3	☐ Addenda No. 4
☐ Addenda No. 5	☐ Addenda No. 6
☐ Addenda No. 7	☐ Addenda No. 8
☐ Addenda No. 9	☐ Addenda No. 10
☐ Addenda No. 11	☐ Addenda No. 12

Request for Taxpayer Identification Number and Certification

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

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

Print or type.
See Specific Instructions on page 3.

1 Name (as shown on your income tax return). Name is required on this line; do not leave this line blank.

Municipal Tax Services LLC

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 seven boxes.

☐ 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) ► **P**

Note: Check the appropriate box in the line above for the tax classification of the single-member owner. Do not check LLC if the LLC is classified as a single-member LLC that is disregarded from the owner unless the owner of the LLC is another LLC that is not disregarded from the owner for U.S. federal tax purposes. Otherwise, a single-member LLC that is disregarded from the owner should check the appropriate box for the tax classification of its owner.

☐ Other (see instructions) ►

4 Exemptions (codes apply only to certain entities, not individuals; see instructions on page 3):

Exempt payee code (if any) _____

Exemption from FATCA reporting code (if any) _____

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

5 Address (number, street, and apt. or suite no.) See instructions.

P.O. Box 2254

Requester's name and address (optional)

City of Stamford

6 City, state, and ZIP code

Huntington, Connecticut 06484-1254

**888 Washington Blvd
Stamford, CT 06904**

7 List account number(s) here (optional)

Part I Taxpayer Identification Number (TIN)

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

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

Social security number

____ - ____ - ____

OR

Employer identification number

20 - 2879422

Part II Certification

Under penalties of perjury, I certify that:

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

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

Sign
Here

Signature of
U.S. person ►

Carl M. DeRubeis

Date ►

11-1-2022

General Instructions

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

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

Purpose of Form

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

- Form 1099-INT (interest earned or paid)

- Form 1099-DIV (dividends, including those from stocks or mutual funds)
- Form 1099-MISC (various types of income, prizes, awards, or gross proceeds)
- Form 1099-B (stock or mutual fund sales and certain other transactions by brokers)
- Form 1099-S (proceeds from real estate transactions)
- Form 1099-K (merchant card and third party network transactions)
- Form 1098 (home mortgage interest), 1098-E (student loan interest), 1098-T (tuition)
- Form 1099-C (canceled debt)
- Form 1099-A (acquisition or abandonment of secured property)

Use Form W-9 only if you are a U.S. person (including a resident alien), to provide your correct TIN.

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

COMMISSION ON HUMAN RIGHTS AND OPPORTUNITIES
CONTRACT COMPLIANCE REGULATIONS
NOTIFICATION TO BIDDERS

(Revised 09/3/15)

The contract to be awarded is subject to contract compliance requirements mandated by Sections 4a-60 and 4a-60a of the Connecticut General Statutes; and, when the awarding agency is the State, Sections 46a-71(d) and 46a-81i(d) of the Connecticut General Statutes. There are Contract Compliance Regulations codified at Section 46a-68j-21 through 43 of the Regulations of Connecticut State Agencies, which establish a procedure for awarding all contracts covered by Sections 4a-60 and 46a-71(d) of the Connecticut General Statutes.

According to Section 46a-68j-30(9) of the Contract Compliance Regulations, every agency awarding a contract subject to the contract compliance requirements has an obligation to "aggressively solicit the participation of legitimate minority business enterprises as bidders, contractors, subcontractors and suppliers of materials." "Minority business enterprise" is defined in Section 4a-60 of the Connecticut General Statutes as a business wherein fifty-one percent or more of the capital stock, or assets belong to a person or persons: "(1) Who are active in daily affairs of the enterprise; (2) who have the power to direct the management and policies of the enterprise; and (3) who are members of a minority, as such term is defined in subsection (a) of Section 32-9n." "Minority" groups are defined in Section 32-9n of the Connecticut General Statutes as "(1) Black Americans . . . (2) Hispanic Americans . . . (3) persons who have origins in the Iberian Peninsula . . . (4) Women . . . (5) Asian Pacific Americans and Pacific Islanders; (6) American Indians . . ." An individual with a disability is also a minority business enterprise as provided by Section 4a-60g of the Connecticut General Statutes. The above definitions apply to the contract compliance requirements by virtue of Section 46a-68j-21(11) of the Contract Compliance Regulations.

The awarding agency will consider the following factors when reviewing the bidder's qualifications under the contract compliance requirements:

- (a) the bidder's success in implementing an affirmative action plan;
- (b) the bidder's success in developing an apprenticeship program complying with Sections 46a-68-1 to 46a-68-17 of the Administrative Regulations of Connecticut State Agencies, inclusive;
- (c) the bidder's promise to develop and implement a successful affirmative action plan;
- (d) the bidder's submission of employment statistics contained in the "Employment Information Form", indicating that the composition of its workforce is at or near parity when compared to the racial and sexual composition of the workforce in the relevant labor market area; and
- (e) the bidder's promise to set aside a portion of the contract for legitimate minority business enterprises. See Section 46a-68j-30(10)(E) of the Contract Compliance Regulations.

INSTRUCTIONS AND OTHER INFORMATION

The following BIDDER CONTRACT COMPLIANCE MONITORING REPORT must be completed in full, signed, and submitted with the bid for this contract. The contract awarding agency and the Commission on Human Rights and Opportunities will use the information contained thereon to determine the bidders compliance to Sections 4a-60 and 4a-60a CONN. GEN. STAT., and Sections 46a-68j-23 of the Regulations of Connecticut State Agencies regarding equal employment opportunity, and the bidder's good faith efforts to include minority business enterprises as subcontractors and suppliers for the work of the contract.

1) Definition of Small Contractor

Section 4a-60g CONN. GEN. STAT. defines a small contractor as a company that has been doing business under the same management and control and has maintained its principal place of business in Connecticut for a one year period immediately prior to its application for certification under this section, had gross revenues not exceeding fifteen million dollars in the most recently completed fiscal year, and at least fifty-one percent of the ownership of which is held by a person or persons who are active in the daily affairs of the company, and have the power to direct the management and policies of the company, except that a nonprofit corporation shall be construed to be a small contractor if such nonprofit corporation meets the requirements of subparagraphs (A) and (B) of subdivision 4a-60g CONN. GEN. STAT.

2) Description of Job Categories (as used in Part IV Bidder Employment Information) (Page 2)

MANAGEMENT: Managers plan, organize, direct, and control the major functions of an organization through subordinates who are at the managerial or supervisory level. They make policy decisions and set objectives for the company or departments. They are not usually directly involved in production or providing services. Examples include top executives, public relations managers, managers of operations specialties (such as financial, human resources, or purchasing managers), and construction and engineering managers.

BUSINESS AND FINANCIAL OPERATIONS: These occupations include managers and professionals who work with the financial aspects of the business. These occupations include accountants and auditors, purchasing agents, management analysts, labor relations specialists, and budget, credit, and financial analysts.

MARKETING AND SALES: Occupations related to the act or process of buying and selling products and/or services such as sales engineer, retail sales workers and sales representatives including wholesale.

LEGAL OCCUPATIONS: In-House Counsel who is charged with providing legal advice and services in regards to legal issues that may arise during the course of standard business practices. This category also includes assistive legal occupations such as paralegals, legal assistants.

COMPUTER SPECIALISTS: Professionals responsible for the computer operations within a company are grouped in this category. Examples of job titles in this category include computer programmers, software engineers, database administrators, computer scientists, systems analysts, and computer support specialists

ARCHITECTURE AND ENGINEERING: Occupations related to architecture, surveying, engineering, and drafting are included in this category. Some of the job titles in this category include electrical and electronic engineers, surveyors, architects, drafters, mechanical engineers, materials engineers, mapping technicians, and civil engineers.

OFFICE AND ADMINISTRATIVE SUPPORT: All clerical-type work is included in this category. These jobs involve the preparing, transcribing, and preserving of written communications and records; collecting accounts; gathering and distributing information; operating office machines and electronic data processing equipment; and distributing mail. Job titles listed in this category include telephone operators, bill and account collectors, customer service representatives, dispatchers, secretaries and administrative assistants, computer operators and clerks (such as payroll, shipping, stock, mail and file).

BUILDING AND GROUNDS CLEANING AND MAINTENANCE: This category includes occupations involving landscaping, housekeeping, and janitorial services. Job titles found in this category include supervisors of landscaping or housekeeping, janitors, maids, grounds maintenance workers, and pest control workers.

CONSTRUCTION AND EXTRACTION: This category includes construction trades and related occupations. Job titles found in this category include boilermakers, masons (all types), carpenters, construction laborers, electricians, plumbers (and related trades), roofers, sheet metal workers, elevator installers, hazardous materials removal workers, paperhangers, and painters. Paving, surfacing, and tamping equipment operators; drywall and ceiling tile installers; and carpet, floor and tile installers and finishers are also included in this category. First line supervisors, foremen, and helpers in these trades are also grouped in this category.

INSTALLATION, MAINTENANCE AND REPAIR: Occupations involving the installation, maintenance, and repair of equipment are included in this group. Examples of job titles found here are heating, ac, and refrigeration mechanics and installers; telecommunication line installers and repairers; heavy vehicle and mobile equipment service technicians and mechanics; small engine mechanics; security and fire alarm systems installers; electric/electronic repair, industrial, utility and transportation equipment; millwrights; riggers; and manufactured building and mobile home installers. First line supervisors, foremen, and helpers for these jobs are also included in the category.

MATERIAL MOVING WORKERS: The job titles included in this group are Crane and tower operators; dredge, excavating, and lading machine operators; hoist and winch operators; industrial truck and tractor operators; cleaners of vehicles and equipment; laborers and freight, stock, and material movers, hand; machine feeders and offbearers; packers and packagers, hand; pumping station operators; refuse and recyclable material collectors; and miscellaneous material moving workers.

PRODUCTION WORKERS: The job titles included in this category are chemical production machine setters, operators and tenders; crushing/grinding workers; cutting workers; inspectors, testers sorters, samplers, weighers; precious stone/metal workers; painting workers; cementing/gluing machine operators and tenders; etchers/engravers; molders, shapers and casters except for metal and plastic; and production workers.

3) Definition of Racial and Ethnic Terms (as used in Part IV Bidder Employment Information) (Page 3)

<u>White</u> (not of Hispanic Origin)-All persons having origins in any of the original peoples of Europe, North Africa, or the Middle East. <u>Black</u> (not of Hispanic Origin)-All persons having origins in any of the Black racial groups of Africa. <u>Hispanic</u>- All persons of Mexican, Puerto Rican, Cuban, Central or South American, or other Spanish culture or origin, regardless of race.	<u>Asian or Pacific Islander</u>- All persons having origins in any of the original peoples of the Far East, Southeast Asia, the Indian subcontinent, or the Pacific Islands. This area includes China, India, Japan, Korea, the Philippine Islands, and Samoa. <u>American Indian or Alaskan Native</u>- All persons having origins in any of the original peoples of North America, and who maintain cultural identification through tribal affiliation or community recognition.
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BIDDER CONTRACT COMPLIANCE MONITORING REPORT

PART I - Bidder Information

Company Name: Municipal Tax Services LLC Street Address: 120 Long Hill Cross Road City & State: Shelton, Connecticut Chief Executive: Carl M. DeProfio-Managing Member		Bidder Federal Employer Identification Number: 20-879422 Or Social Security Number:
Major Business Activity: Locate, identify & investigate motor vehicles & personal property excluded from the City's Grand List.& based on evidence acquired if it should be added to the Grand List and for which tax yearsand notify the Assessor of such.		Bidder Identification (response optional/definitions on page 1) -Bidder is a small contractor? Yes ☒ No ☐ -Bidder is a minority business enterprise? Yes ☐ No ☒ (If yes, check ownership category) Black ☐ Hispanic ☐ Asian American ☐ American Indian/Alaskan Native ☐ Iberian Peninsula ☐ Individual(s) with a Physical Disability ☐ Female ☐ -Bidder is certified as above by State of CT? Yes ☐ No ☐
Bidder Parent Company: (If any) N/A		
Other Locations in CT: (If any) N/A		

PART II - Bidder Nondiscrimination Policies and Procedures

1. Does your company have a written Affirmative Action/Equal Employment Opportunity statement posted on company bulletin boards? Yes ☒ No ☐	7. Do all of your company contracts and purchase orders contain non-discrimination statements as required by Sections 4a-60 & 4a-60a Conn. Gen. Stat? Yes ☒ No ☐
2. Does your company have the state-mandated sexual harassment prevention in the workplace policy posted on company bulletin boards? Yes ☒ No ☐	8. Do you, upon request, provide reasonable accommodation to employees, or applicants for employment, who have physical or mental disability? Yes ☒ No ☐
3. Do you notify all recruitment sources in writing of your company's Affirmative Action/Equal Employment Opportunity employment policy? Yes ☒ No ☐	9. Does your company have a mandatory retirement age for all employees? Yes ☐ No ☒
4. Do your company advertisements contain a written statement that you are an Affirmative Action/Equal Opportunity Employer? Yes ☒ No ☐	10. If your company has 50 or more employees, have you provided at least two (2) hours of sexual harassment training to all of your supervisors? Yes ☐ No ☐ N/A ☐
5. Do you notify the Ct. State Employment Service of all employment openings with your company? Yes ☐ No ☒	11. If your company has apprenticeship programs, do they meet the Affirmative Action/Equal Employment Opportunity requirements of the apprenticeship standards of the Ct. Dept. of Labor? Yes ☐ No ☐ N/A ☒
6. Does your company have a collective bargaining agreement with workers? Yes ☐ No ☒	12. Does your company have a written affirmative action Plan? Yes ☒ No ☐ If no, please explain.
6a. If yes, do the collective bargaining agreements contain non-discrimination clauses covering all workers? Yes ☐ No ☐	
6b. Have you notified each union in writing of your commitments under the nondiscrimination requirements of contracts with the state of CT? Yes ☐ No ☐	13. Is there a person in your company who is responsible for equal employment opportunity? Yes ☒ No ☐ If yes, give name and phone number: Carl M. DeProfio - 203-402-0780

1. Will the work of this contract include subcontractors or suppliers? Yes ☒ No ☐

1a. If yes, please list all subcontractors and suppliers and report if they are a small contractor and/or a minority business enterprise. (defined on page 1 / use additional sheet if necessary)

Wilfredo Vega - Minority Independent Contractor

1b. Will the work of this contract require additional subcontractors or suppliers other than those identified in 1a. above? Yes ☐ No ☒

PART IV - Bidder Employment Information

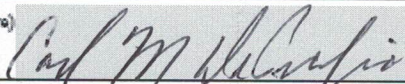
Date: November 1, 2022

JOB CATEGORY*	OVERALL TOTALS	WHITE (not of Hispanic origin)		BLACK (not of Hispanic origin)		HISPANIC		ASIAN or PACIFIC ISLANDER		AMERICAN INDIAN or ALASKAN NATIVE	
		Male	Female	Male	Female	Male	Female	Male	Female	Male	Female
Management	2	2									
Business & Financial Ops	2	1	1								
Marketing & Sales											
Legal Occupations	1		1								
Computer Specialists	2	2									
Architecture/Engineering											
Office & Admin Support	10	8	2			1					
Bldg/ Grounds Cleaning/Maintenance											
Construction & Extraction											
Installation, Maintenance & Repair											
Material Moving Workers											
Production Occupations											
TOTALS ABOVE	17	13	4			1					
Total One Year Ago	17	13	4			1					
FORMAL ON THE JOB TRAINEES (ENTER FIGURES FOR THE SAME CATEGORIES AS ARE SHOWN ABOVE)											
Apprentices											
Trainees											

*NOTE: JOB CATEGORIES CAN BE CHANGED OR ADDED TO (EX. SALES CAN BE ADDED OR REPLACE A CATEGORY NOT USED IN YOUR COMPANY)

1. Which of the following recruitment sources are used by you? (Check yes or no, and report percent used)				2. Check (X) any of the below listed requirements that you use as a hiring qualification (X)		3. Describe below any other practices or actions that you take which show that you hire, train, and promote employees without discrimination Each employee must: Pass a criminal background check since they must be registered with the Dept. of Public Protection to work under the owner's Private Detective License. Complete an in-house training program regards the laws relating to tax assessment. Achieve a test score of 80% or above on items contained in the training program. Complete 3 months of training with a senior agent. Sign an affidavit of tax compliance, non-compete, non-disclosure and confidentiality agreements
SOURCE	YES	NO	% of applicants provided by source			
State Employment Service	☐	☐			Work Experience	
Private Employment Agencies	☒	☐		X	Ability to Speak or Write English	
Schools and Colleges	☐	☐			Written Tests	
Newspaper Advertisement	☐	☐		X	High School Diploma	
Walk Ins	☐	☐			College Degree	
Present Employees	☒	☐	95%		Union Membership	
Labor Organizations	☐	☐			Personal Recommendation	
Minority/Community Organizations	☐	☐			Height or Weight	
Others (please identify)	☐	☐			Car Ownership	
Assessors	☒	☐	5%	X	Arrest Record	
	☐	☐			Wage Garnishments	

Certification (Read this form and check your statements on it CAREFULLY before signing). I certify that the statements made by me on this BIDDER CONTRACT COMPLIANCE MONITORING REPORT are complete and true to the best of my knowledge and belief, and are made in good faith. I understand that if I knowingly make any misstatements of facts, I am subject to be declared in non-compliance with Section 4a-60, 4a-60a, and related sections of the CONN. GEN. STAT.

(Signature) 	(Title) Managing Member	(Date Signed) 11/1/2022	(Telephone) 203-402-0780
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