

RFP NUMBER 18-03

MARKET LEADERS WITH PROVEN RESULTS

TEAM OF PROPERTY MANAGEMENT EXPERTS IN TALLAHASSEE

INNOVATION PARK OF TALLAHASSEE



Presented by:

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BECK
PARTNERS

Real Estate + Insurance



TAB 2

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Executive Summary

On behalf of Beck Partners and our project team, I am pleased to submit our proposal for Management and Accounting Services for Innovation Park. We have thoroughly reviewed the properties and RFP and have developed this proposal with our understanding of the Authority's goals and objectives.

We recognize the importance of the properties as significant assets of the Authority. The Beck Partners team seeks to add value through our management and accounting services in order to maximize NOI, tenant satisfaction, and overall asset performance.

To achieve this goal, the project team will build upon Beck Partners 30+ years of experience in Northwest Florida. As a company, our firm currently manages in excess of two million square feet of office, retail, and flex space throughout Northwest Florida. Furthermore, our current leasing assignments included nearly 3 million square feet of space throughout the region, including the Pensacola Technology Campus.

The accompanying proposal highlights the many advantages of partnering with Beck Partners. Highlights include:

- Experience – Managing Director of Property Management, Brice Pelfrey, is a Certified Property Manager (CPM) designee and has over 14 years of experience managing commercial properties in the region. Additionally, Donnie Kean, our Senior Property Manager for our Tallahassee portfolio, has over 23 years of commercial property management experience in the Tallahassee market.
- Expertise – Our firm has professionals with the highest designations in commercial real estate. This includes two CPM designees, three SIOR designees, and three CCIM designees. Furthermore, our team is adept at using the industry's best technology including Yardi property management and accounting software, and Avid Xchange invoice processing.
- Commitment – Our team is committed and excited to expand our Tallahassee portfolio and we guarantee the highest level of personal service and professionalism.

We opened our Tallahassee office 5 years ago with the goal of being North Florida's premier commercial real estate company. We recently closed on a \$1.2 million office building in Downtown Tallahassee which will serve as our Tallahassee office following updates and improvements to the building. There are several capital improvements planned for the building to bring new life for the tenants and visitors. New windows, new paint, elevator improvements, bathroom renovations, and technology upgrades are just the start. We have hired and will continue to hire the best local talent, and plan to grow and provide additional jobs within the Tallahassee market.

Beck Partners is positioned to provide best in class management, accounting, maintenance, and leasing services for these properties.

With our mission to "create innovative partnerships to forge successful futures," we align with your mission "to promote our region's research and development assets, and to foster the attraction, startup, and growth of private innovative companies that create high wage jobs in Leon County." We see this as an advantageous partnership with a positive future.

On behalf of the Beck Partners, thank you for the opportunity and we look forward to working with you.

Very truly yours,


Brice Pelfrey, CPM
Director of Property Management
Beck Partners CRE, LLC

TAB 3

**OPERATIONS & MANAGEMENT PLAN,
ACCOUNTING SERVICES,
AND REPORTING PLAN**

TAB 3.1

OPERATIONS & MANAGEMENT PLAN



Operations & Management Plan

Executive Summary

Designated Property Manager:

Donnie Kean will serve as the designated property manager for Innovation Park. She will be supervised by Brice Pelfrey, CPM.

Manager and Maintenance Personnel Weekly Involvement:

The designated property manager (DPM) will be on site at least two days per week for scheduled inspections and quality control. The DPM will inspect 2-3 buildings each visit and make contact with tenant liaisons as necessary.

Beck Facility Maintenance personnel (BFM) will hold scheduled office hours on site. BFM personnel will perform the tasks outlined by the Authority per section 2.18.1.2 of the Property Management and Accounting Services Agreement and any other necessary tasks identified by the DPM.

Sample checklists of duties to be performed by the DPM and BFM personnel while on site is enclosed. These checklists will be tailored to the buildings specific requirements.

All management and maintenance personnel will be easily identifiable with BFM apparel or name tags.

Designated Property Manager Monthly Involvement

- Complete Monthly operating summary and variance reports
- Summary to include: log of meetings with tenant contacts, completed and in progress work orders etc.
- Attend board of governors meetings
- Walk through with maintenance personnel and contracted vendors for quality control
- Review current vendor contracts and compare with contracts for other similar properties in the market
- Recommendations for change in vendors or pricing
- If necessary contracts for service will be bid following Authority established guidelines
- Regular inspections by Management Director of Property Management for quality control

Operations & Management Plan

Tenant or maintenance issues identified during property visits will be inspected and evaluated by the property manager for resolution.



Property Visits



Any tenant issues that arise when the property manager is not on site will either be emailed, called in, or sent electronically via our website into the property management office.

Maintenance Request

Maintenance requests are evaluated by the property manager. They determine if the issue can be corrected by BFM maintenance personnel or will need to be outsourced to vendor.



Work Order Processing



Receipt of the request is then acknowledged with advisement to the tenant of steps being taken to address and correct and the issue is entered into Yardi as a service request work order maintenance log for tracking purposes and assigned to the appropriate maintenance personnel or vendor.

Correspondence

At any given time, should an emergency arise during business hours, management or maintenance personnel will be on site at the property within one hour.



All members of Property Management are on call 24/7. For after-hours calls, an answering service directs calls to appropriate personnel.



Example Maintenance Checklist

Weekly Scheduled Task Checklist	
Clean off BPC sign	
Walk exterior of property and pick up all trash – be sure to check for trash in grass/around perimeter	
Make a note of any issues that PM needs to be made aware of	
Clean up areas around dumpsters	
Clean up front parking area	
Treat for ants	
Be sure entry area is swept and clear of debris, being mindful of visitors	
Wipe off window ledges	
While doing windows ledges - check exterior of building for any insects and eradicate as needed and sweep down any cobwebs that you find and spray wasp nests and remove them.	
Kill or pull up any weeds growing around base of building and in sidewalks	
Check parking lot and driveways for any potholes or low areas that could present a "trip" hazard	
Remove gum from sidewalks	
Sweep or blow leaves accumulated around parking bumpers and curbs. Also, make sure the bumpers are in place securely and make sure rebar is not above the bumpers.	
Check and straighten all handicap parking signs	
Check all irrigation timers	
Check all lighting timers and photo cells	

[illegible]

Supplies Summary	
Supplies Purchased:	Supplies Onhand: (Description and Cost of Item to be billed)
Receipt	
Rec Date:	
Rec #	
Tot Amt	
Rec Date:	
Rec #	
Tot Amt	
Rec Date:	
Rec #	
Tot Amt	

TAB 3.2

ACCOUNTING SERVICES



Accounting Services

Overview

Accounting Department Mission Statement:

"We strive to provide financial security with complete confidence and transparency with our clients. We use all available tools, and report data in accordance with GAAP and its established concepts. Our department will timely compile financial reports to inform and communicate all aspects of the property's financial standing with precise accuracy. Reports are tailored to each client's individual circumstances with purpose and clarity."

Our Accounting Department's operating procedures are rooted in the core values upheld by Beck Partners. We are Fearless, Agile, Smart, and Transparent. Our experience allows us to be proactive in handling all possible situations. Trust is important. You can trust that our personnel adheres to strict internal control regulations as well as federal, state, and local regulations. While working with clients in multiple regions throughout the U.S., we provide accurate and timely financial accounting services.

With the use of our property management software Yardi, clients can access accounting information from anywhere and at any time. Property owners can review payables and vendor information, as well as receivables from tenants. Our clients can also use Yardi to make daily rent payment deposits to increase cash flow. While our accounting headquarter is in Pensacola, rent payments can also be dropped off in our Tallahassee office or paid online via our tenant portal. This allows our clients to make payments quickly and without hassle. Furthermore, our accounting department understands the importance of communication and will always be willing to assist you with the financial information related to your assets.

FEARLESS | AGILE | SMART | TRANSPARENT

Our financial reporting is supported by CPAs in the Pensacola and Tallahassee areas that are available to advise and assist in data processing. The cycle of checks and balances is used in every aspect of our accounting department, and our accounting processes and procedures are detailed and streamlined. This allows our clients to have confidence in the accuracy of financial information while we input, store, and retrieve data quickly and exactly.

We use secure cloud-based software tools such as AVIDXchange, YARDI, and Office 365 to process information faster, compile more thorough and accurate records, and ensure the secure retention and confidentiality of our client's information. In the following section, you will find the Receivables Workflow, Payables Workflow, and the Month End Workflow. Each of these provides a detailed look at how we will be handling your individual account. You will see the above-stated checks and balances and cohesive interaction between our departments that increase accountability and accuracy, and aides us in providing you with the best customer service that we have to offer.

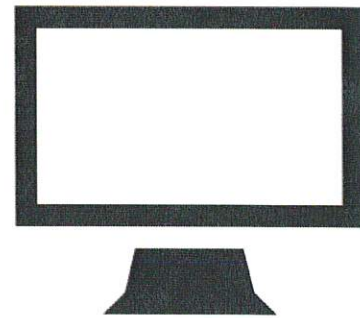
Accounting Services

Receivables Workflow



Deposit Prep

Rents are received in our Tallahassee office, deposits are prepared for bank delivery, scanned, and sent electronically to Beck Partners Accounting Headquarters (BPAH). Once the deposit is complete, the bank receipt is then scanned and sent electronically to BPAH.



Deposit Processing

Once the scanned rents are received by BPAH, the accounting department applies the credit to the appropriate account and attaches the deposit image and the bank receipt to the deposit in the lease management system (YARDI) as a part of our thorough record retention policy.



Deposit Confirmation

After the rents have been processed by BPAH, the Controller receives notification the deposit has been processed in order to verify correct application and final verification of the deposit is complete upon bank reconciliation at month's end.

Accounting Services

Payables Workflow

Invoice Receipt

Invoices are received in our Tallahassee office. They are date stamped, scanned, and sent to our 3rd party payables processing company (AVID).

Invoices work their way through preset approval workflows within AVID. First step being Property Manager approval, then Controller approval and verification, and finally Accounting Associate coding and notation, with AVID tracking all invoice activity and approvals with time and date stamps.



Invoice Upload

Invoices are then uploaded to YARDI and posted awaiting the next check run. Along with invoice information, images of the invoices are also uploaded into YARDI as a part of our thorough record retention policy.

Open A/P reports are ran twice a month and emailed to the Authority with a suggested check run, Authority approves or suggests alternatives. BPAH cuts approved checks and mails them to the Authority for signature and mail out, with each step of this having 2 days for completion. Check runs are completed 2 times per month.



Accounting Services

Month End Workflow



Bank Reconciliation

Bank statements are received by our Tallahassee office. They are date stamped, scanned, and sent to BPAH for processing. The Controller processes bank reconciliations within YARDI. Once complete, the Accounting Associate prepares a bank reconciliation summary page, attaches to the bank reconciliation and it's submitted to the following parties for review and signature: Property Manager, Broker of Record for BPAH, and the Authority. Bank reconciliations are completed by the 10th of the month on mailed bank statements.

Once bank reconciliations are complete, the Controller reviews the monthly financials within YARDI for completion and verification. The Accounting Associate then produces the monthly reporting package for the Property Manager's review.



Property & Financial Reporting



Financial Review

Once the Property Manager reviews the financials, they produce their Monthly Reporting package to send to the Authority by the 15th of the month.

TAB 4

Qualifications & Experience

TAB 4.1

ABOUT US



About Us

Beck Partners CRE, LLC

Established in 1981, Beck Partners has built its' reputation on developing honest, straight forward, results-based relationships with clients at the local, regional, and national levels. It employs the region's most successful agents who work in sales, leasing, management, and consulting. Clients draw on the knowledge and experience of an entire team of commercial real estate experts. Its agents participate in highly specialized industry organizations such as SIOR and CCIM and IREM.



Beck Partners is currently organized into two key service areas:

Transaction Services

Represents the interest of tenants, owners, buyer or sellers in the leasing, acquisition and disposition of commercial real estate and unimproved land. Historically referred to as commercial brokerage, transaction service drives the Company's revenue.

Management Services

Provides comprehensive property management, leasing and related services for income producing properties owned primarily by institutional investors, along with facilities management services for corporate users.



About Us

Property Management Profile

We have provided property management services since our inception. From that time, clients have depended on us to provide accurate and timely accounting and open communication, as well as to reduce operating costs and maximize asset value. Our future and reputation is staked on our desire and ability to always deliver the best service. It is our belief that service almost always guarantees satisfaction, and that satisfaction builds loyalty. In return, loyalty guarantees long-term relationships that are mutually beneficial.

Beck Partners CRE looks at a project from an overall perspective. We deeply value our partnerships with owners and work hard to understand their goals. Each client and each property is unique; therefore, our approach is always customized.

We provide a full range of property management services including:

- ◆ **Tenant Relationships and Retention**
- ◆ **Budgeting**
- ◆ **Account Receivable and Payable**
- ◆ **Accounting and Financial Reporting**
- ◆ **Construction Administration and Management**
- ◆ **Marketing and Leasing**

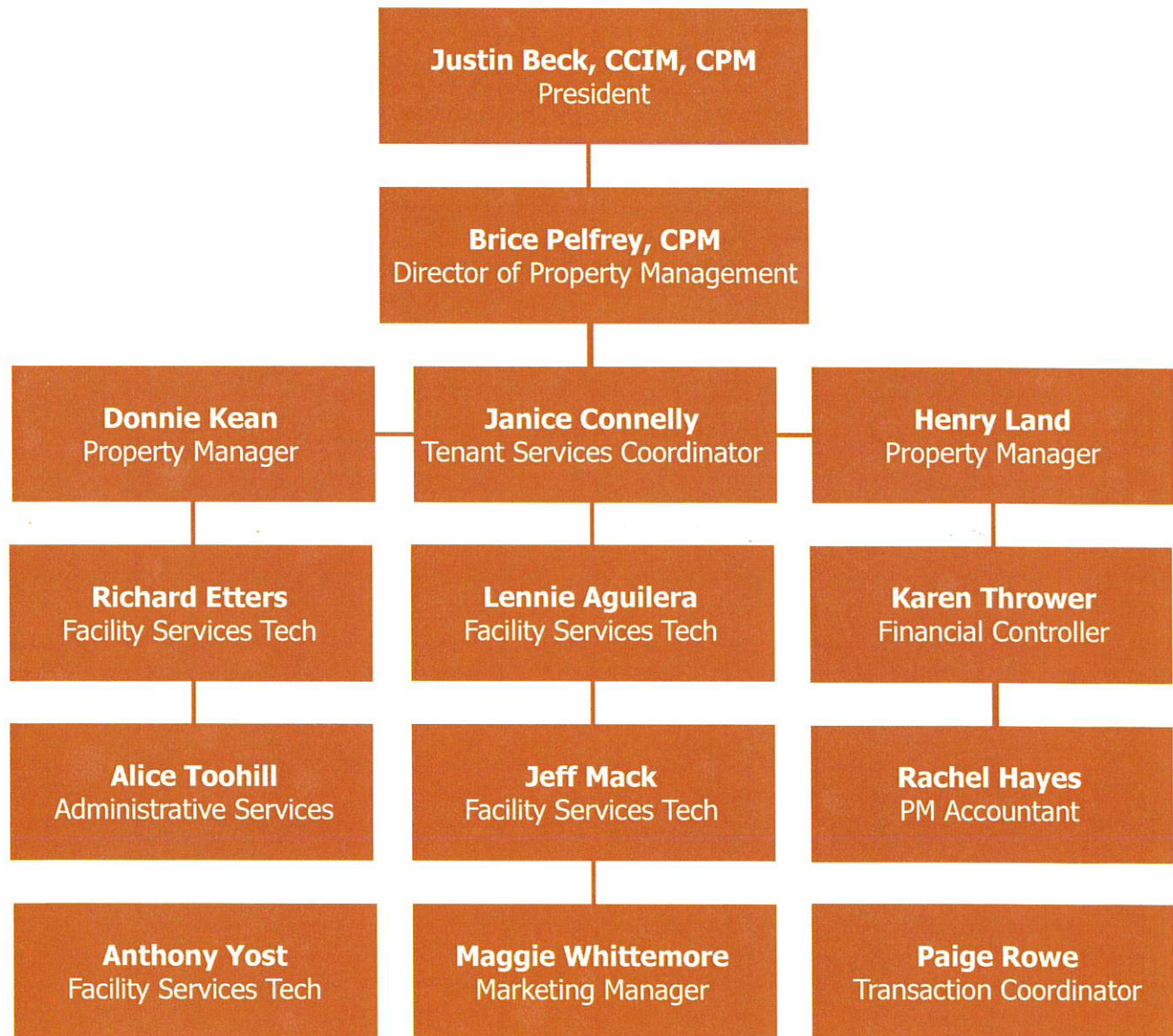
FACILITY MANAGEMENT

Beck Facility Management provide commercial maintenance services to property owners, managers and businesses across the Florida Panhandle. Operating 365 days per year we will keep your facilities running smoothly. Our in-house technicians can diagnose and repair any problem, install new services and fixtures and perform preventative commercial maintenance services. We are highly experienced in the process of selecting, hiring and managing subcontractors, and holding each subcontractor accountable for the same level of service we expect from our own technicians.



About Us

Property Management Team





About Us

Property Management Team Biographies

JUSTIN BECK, CCIM, CPM

CEO



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Selected Client List

Washington Prime
Continental Realty
Corporation
Gulf Power
Five Guys Burger and Fries
Studer Properties
Sonic Automotive
Navy Federal Credit Union
Charter Bank
Harvesters Federal Credit
Union
University of West Florida
Pensacola Area Chamber of
Commerce
Waterstone Retail
Westwood Financial

Professional Background

A graduate of the University of Alabama at Birmingham with a Bachelor's Degree in Business Management, Justin began his career at Beck Partners as a sales associate, then as a broker-associate, and in 2009 was named President of the company. Justin is a CCIM designee, and is a licensed Real Estate broker in Florida and Alabama. Justin's responsibilities include the day-to-day operation and strategic planning of Beck Partners. Justin has a commitment to strong partnerships, a talent for attracting talented professionals, and an ability to mastermind solid Commercial Real Estate strategies.

Before becoming President of the Commercial Real Estate Division of Beck Partners, Justin served as President for Beck Property Company, the predecessor of Beck Partners.

Justin was with AmSouth Bank before joining Beck Partners. There he worked in the trust division and was involved in property and timberland management. Justin has completed over 400 transactions in the eight years he has been with the company, and is consistently ranked as the top commercial producer in the area.

Justin continues to grow the most dynamic Commercial Real Estate Brokerage firm on the Gulf Coast. Justin exemplifies a caring attitude, a knack for communication, and the ability to build a strong team. He creates a highly passionate and collaborative culture, which is a direct result of the dedication and creativity exuded by Justin.

Memberships & Affiliations

- CPM Designee from the Institute of Real Estate Management (IREM)
- CCIM Designee
- Florida and Alabama Licensed Real Estate Broker
- Past NAIOP State Board, Chapter Board and Chapter President
- Past Escambia County Planning Board member
- Commercial Real Estate Coach for the Massimo Group
- Pensacola Museum of Art Trustee
- Pensacola Bay Area Chamber of Commerce - Board Member, Executive Committee, Policy Committee Chair, Building and Facility Chair
- Boy Scouts of America, Gulf Coast Council Executive Committee

Awards & Honors

- NAIOP Deal of the Year, 2013, 2014, 2015
- NAIOP Development of the Year, 2009, 2013, 2016
- NAIOP 2010 Developing Leaders Award
- 2014 Real Estate Forum Magazine Rising Leaders in the Southeast

Education

- Bachelor of Science, Business Management
-University of Alabama at Birmingham

Personal

Justin is avid reader, runner and cyclist. But most importantly, when away from the office, Justin enjoys spending time with his wife and three children.



About Us

Property Management Team Biographies

BRICE PELFREY, CPM

Director of PM



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Professional Background

Brice joined the Beck Partners team in 2012. He has over nearly two decades of diversified property management and real estate experience that includes managing 2 million square foot portfolio of office and retail properties. Furthermore, Brice has significant experience in facilities management, having led a team of four building engineers.

Brice is responsible for the direction of Beck Partners' entire management portfolio, which include owner and tenant relations, financial performance, construction management, leasing support, contractor and vendor selection, as well as day-to-day operations of Beck Facility Maintenance Division.

Education | Affiliations | Memberships

- Bachelor of Science, Real Estate and Multinational Business
-Florida State University
- CPM (Certified Property Manager) Designee
- Licensed Florida Real Estate Sales associate
- Member of BOMA (Building Owners and Managers Association)
- Member of IREM (Institute of Real Estate Management)

Personal

Brice enjoys spending time with his wife Brandice and their beautiful daughter Ellie. As a Pensacola Native, he is excited to be back after living in Tallahassee for 10 years and is enjoying his career at Beck Partners.



About Us

Property Management Team Biographies

DONNIE KEAN

Senior Property Manager



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Professional Background

Donnie joined Beck Partners in September of 2013. She has over 21 years of experience in commercial property management, most recently holding the position of Director of Property Management for a large regional firm and overseeing the management of over 1.5 million square feet.

Donnie has experience in all areas of commercial property management, from overseeing the maintenance team to interacting routinely with the owners of the Class A properties under her oversight.

Donnie is responsible for opening and overseeing the Beck Partners office in Tallahassee. With her excellent reputation and many contacts in the industry, her focus is growing the portfolio in Tallahassee while rendering exceptional service to the properties already under her oversight.

Education | Affiliations | Memberships

- Associates Degree, Legal Secretarial Science
-St. Petersburg College
- Licensed Florida Real Estate Sales Associate
- Board Member and Treasurer of BOMA Tallahassee
- Honored by the local BOMA Chapter as an outstanding local leader

Personal

Donnie and her husband, Ed, have been married for 44 years and have three children and seven grandchildren. She is a Florida native and has resided in Tallahassee for over 21 years.



About Us

Property Management Team Biographies

HENRY LAND

Property Manager



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Professional Background

Henry Land has been in property management since 2004. Prior to joining Beck Partners, he was the Property Manager with SVN Southland where he handled predominantly office and retail space in the greater Pensacola area. He added construction management to his expertise with a national residential and commercial construction company, JBF Real Properties. Before that, he focused on single-family and multi-family student housing in Tallahassee with Stadium Property Rental. He has been a licensed Florida Real Estate Agent since 2009 with experience in real estate sales in Pensacola and Tallahassee.

Henry brings a great deal of experience in commercial management and sales with single-family, multi-family, and commercial properties to the team. His client-oriented mindset and agility in his management style make him a perfect addition to our team.

Education | Memberships | Affiliations

- Licensed Florida Real Estate Sales Associate
- Member of Surfers On Mission

Personal

Henry is passionate about spending time with family and helping people in need. He loves introducing his kids to new experiences.



About Us

Property Management Team Biographies

JANICE CONNELLY

Tenant Services Coordinator



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Professional Background

Janice joined Beck Partners in September of 2014. Connelly has over 20 years of experience in facility management and all aspects of human resources. She also has an extensive community relations background with strengths in project management and leadership, as well as community liaison.

Janice is responsible for tenant, contractor and vendor relations, property management reporting, supporting the Director of Property Management, as well as day-to-day operations of Beck Facility Management. Connelly strives to provide superior service and to insure a safe, clean and healthy environment for all properties and their tenants.

Education | Affiliations | Memberships

- Associates Degree, Elementary Education
- Escambia School District Youth Motivator Program - Mentor
- American Cancer Society – MSABC Team Development Committee

Personal

Janice is the proud mother of four daughters and has eight grandchildren. In her free time she enjoys family, kayaking, gardening and walking her dog, Zalea.



About Us

Property Management Team Biographies

RACHEL HAYES

Property Management
Accountant



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Professional Background

Rachel Hayes joined Beck Partners in April of 2017. She joins us from Etheridge Property Management where she invested over 5 years helping them with property owner and association accounting, budgeting, AP/AR, financial statements and sales/federal taxes. Prior to this, she held the position as a Staff Accountant with Accounting Services at Pensacola working with small businesses with their bookkeeping, accounting, payroll and providing monthly and quarterly financial reviews with them.

She's familiar with various accounting system software and Microsoft Office and enjoys learning.

Education | Memberships | Affiliations

- Accounting Courses
- Volunteer for March of Dimes
- Volunteer for Now I Lay Me Down to Sleep
- Horse Leader for Equine Kids

Personal

When Rachel is not working, she enjoys spending time with her family, golfing, sewing and horseback riding.



About Us

Property Management Team Biographies

KAREN THROWER

Financial Controller



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Professional Background

Karen joined Beck Partners in May 2016. Karen has over 15 years of accounting experience for various not-for-profit organizations, while also finding the time to start her own accounting business.

Her skill set includes Accounts Payable, Accounts Receivable, Reconciliations, Monthly Reporting and Budgeting. She has a drive to continually learn and explore new concepts.

Karen also has a passion for history, and has spent five years recording artifacts, exhibit development and data tracking for the National Museum of Naval Aviation. Karen received her Bachelor's Degree from UWF and is currently in the process of obtaining her Master's in Accounting.

Education | Affiliations | Memberships

- Bachelor's degree and graduate work in History, University of West Florida
- Master's degree candidate in Accounting

Personal

Karen enjoys traveling and experiencing new cultures locally and around the world. She is an avid reader and loves spending time with her husband and three boys.



About Us

Property Management Team Biographies

ALICE TOOHILL

Property Management
Accountant



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Pensacola, FL 32502

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Professional Background

Alice joined Beck Partners in April of 2014. Alice provides support for the Principals and agents at Beck Partners.

Prior to joining Beck, Alice worked for 10 years as Co-owner and Office Manager for Brooks Dental Laboratories, Inc, Pensacola, FL and moved to Mattheiss Engineering, Inc. as Office Manager when it purchased Brooks. Alice founded and served as Owner/Director for "I DO CARE", Pensacola, Florida for 3 years. Her company provided care and assistance for the elderly in Escambia County.

Personal

Alice is married to Steve Toohill, U.S.N., Ret. She has 3 children and 5 grandchildren who are the light of her life.

TAB 4.2

TECHNOLOGIES

Management Software

YARDI

From commercial real estate owners and managers with small portfolios to large global enterprises, Yardi Voyager combines property management and accounting with ownership, financials, budgets, forecasts, construction, and maintenance for a holistic view of your portfolio. Voyager is an end-to-end commercial property and financial management platform for office, retail, and industrial real estate. Voyager automates processes with role-based dashboards, workflows, critical date notifications, and analytics to help increase efficiency and improve decision making. Enabling faster execution of property operation strategies, Voyager helps drive improved analysis and decision-making and delivers maximum transparency across your business.

Automated Lease Administration

The Voyager lease administration system forms the backbone of the commercial billing process, which accommodates indexation, complex recoveries, retail overages, non-currency leases, and much more. The automated leasing work-flow allows lease administrators to set up terms and complicated industrial, office, and retail leases and amendments, while reviewers can compare the abstract to the actual legal documentation before activation. All lease modifications such as expansion, contraction, relocation, holdover, or renewals are stored with the lease details for easy drill-down and historical reference. Leases can be organized by customer making the billing and analysis of multiple leases for national tenants simple.

Key Highlights

- » Drives workforce efficiency and reduces spreadsheet dependency with automated processes, dashboards, workflows, and notifications
- » Enables fast completion of tasks throughout the entire property management lifecycle
- » Improves decision making and informs your property and portfolio strategies with real-time analytics that highlight risk
- » Supports global organizations with multiple currencies and languages, multiple GAAP, and local taxation
- » Provides real-time, 24/7 access to operational data with Yardi Mobile Apps

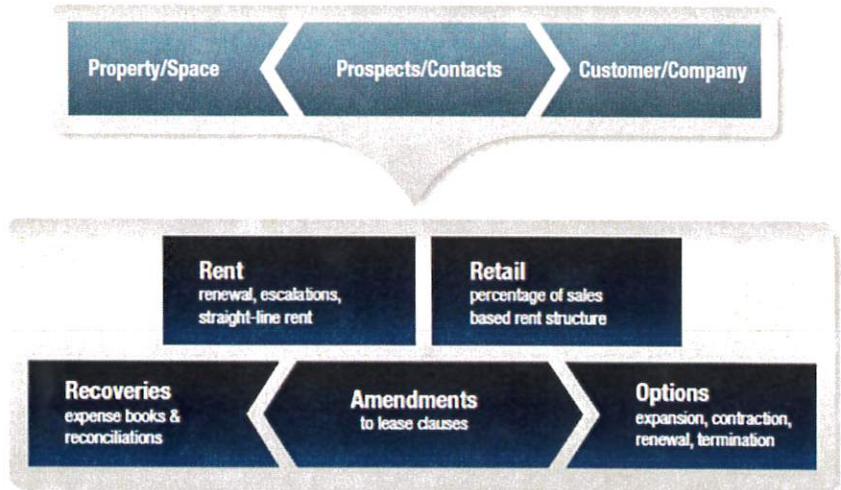
Streamlined Recoveries

Voyager automates the recoveries process. You can configure the varying numerators and denominators, base years, caps, gross-ups, and management fees for the terms defined in the lease. And because the calculations differ for each tenant, Voyager will eliminate the daunting job of reconciling all variables and compiling an accurate accounting of what your tenants owe. The billing results are invoiced to your tenant in an easy-to-understand format that will help reduce tenant billing disputes and increase cash flow.

Critical Dates & Notifications

Critical dates, tasks and notifications are an integral part of the Voyager lease management system. Critical dates and tasks are integrated into the user's dashboard, so that important deadlines are never missed. You can automate the tasks or email notification based on critical dates you define, including:

- Lease Expirations
- Option Notices
- Tenant Insurance Expirations



In addition, you can use tasks and email notifications to perform valuable internal audit functions. They deliver daily, weekly, or monthly notifications such as:

- Outstanding AR older than 30, 60, 90 days
- Financial periods not closed
- Batches left un-posted
- Whether your NOI is with acceptable standards

Correspondence Management

Yardi Correspondence Management will redefine how you process documents. It allows you to create customized invoices and statements, collection letters or prospect letters of intent, as well as owner or investor reporting packages. Templates merge with lease data, reports and graphs, and the generated documents can be automatically emailed, printed or saved as PDF's.

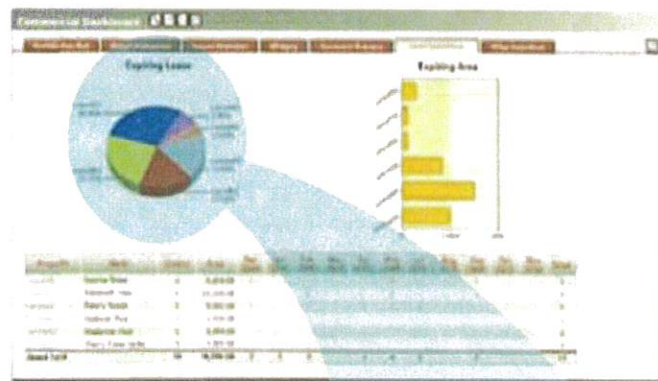
Advanced Retail

Voyager makes it simple to track sales and charge percentage rents. The tenant retail parameters allow you to easily define sales types, reporting and billing frequencies and break-points, including an automatic calculation of natural breakpoints. The overage function automatically calculates and creates your percentage rent charge. Retail analytics provide up-to-the-minute reporting on sales, including MTD, YTD, Moving Annual Total (MAT) comparison and tenant occupancy costs.

Portfolio Reporting & Analysis

Role-Based Dashboard

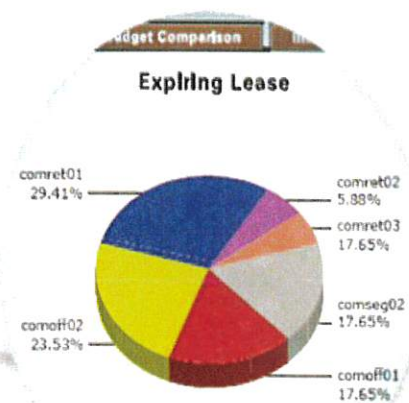
The commercial dashboard maximizes efficiency and transparency by allowing you to see property tasks and performance in a single user-friendly interface. Your property managers can track critical dates, pending lease workflow actions, work order summaries, and access to key reports like stacking plans. All with the ability to drill down to transaction level detail.



Real-Time Analysis






Designed to meet the needs of managers who want to analyze information in a fast and flexible way, Yardi Analytics are a new breed of reporting tools that enables real-time key performance indicators. Analytics are built to facilitate drill-down to source transactions, and flexible enough to *slice and dice* property data by attribute like portfolio, region, period, and currency.

- Analyze by attribute, entity, GL book, segment, period
- Drilldown from summary to source transaction
- Publish to PDF or Excel
- Email report packages automatically
- Create your own KPIs with custom analytics
- Optimized for fast results







Commercial Analytics

Yardi Analytics include comprehensive commercial property and portfolio reporting. From owner re-ports to internal exception and management reporting, the suite of commercial analytics is geared toward increasing the performance of individual and consolidated properties and toward identifying outliers in a large portfolio. Commercial analytics provide real-time key performance indicators for lease management, recovery reconciliation, performance statistics, any many more including:

-  Rent Roll and vacancy
-  Lease abstracts
-  Occupancy summary
-  Expense recovery and reconciliation
-  Projections for current and future lease expirations Custom commercial reports using custom analytics

Financial Analytics

Yardi Analytics also provide comprehensive reporting and key performance indicators. The financial analytics engine leverages Voyager's accounting platform by drawing directly from the operating general ledger transactions. Create instant comparisons and analyses, and compile your monthly, quarterly and yearly financial report packages in real-time. Slice and dice your income statement by user-defined property attributes, view your balance sheet by country and currency, and publish financial reports to an investor portal with the click of a button.

-  Supports IFRS, GAAP, and international accounting needs Used by
-  publicly traded companies around the world Automated delivery with
-  correspondence management Speed of reporting optimized by Voyager
-  data-marts Custom financial reporting using custom analytics

AvidBill PRODUCT OVERVIEW

AvidXchange's electronic invoicing offering that captures invoice data from vendors.

Key Features

● RECEIVE INVOICES FASTER

Eliminate the waiting time required for invoices when they are mailed. By receiving invoices faster, your company will also be able to take advantage of early payment discounts

● REDUCE VENDOR INQUIRIES

Your vendors will receive email confirmations upon receipt of their invoices, so there will no longer be a need for them to call you to ensure that you've received their invoices by mail.

● IMPROVE CASH FLOW MANAGEMENT

Your company will have better visibility into outstanding payables and payment obligations.

● EASY SUBMISSION OPTIONS

Vendors are able to submit their invoices electronically via email or secure web submission. Vendors are able to submit their paper invoices using a secure lockbox, which are then converted to an electronic format.

● RECEIVE 100% ELECTRONIC INVOICES

Through electronic vendor submission options and conversion to electronic formats for all paper invoices, your company will be able to receive all of your invoices electronically.

OVERVIEW

Join the more than **200,000 vendors** nationwide that utilize the AvidBill Network to securely automate their invoice submission and receipt processes. **We make it easy for vendors to submit 100% of their invoices electronically through a variety of methods.** Upon invoice receipt, the data that you would input manually today is automatically populated in your system. Doesn't that sound easy? It is.



"Electronic capture prevents a tremendous amount of manual input and misplaced information."

- Richard Ross, *Chief Financial Officer*
Branch Properties

LEARN MORE: WWW.AVIDXCHANGE.COM/PAGE/SOLUTIONS



800.560.9305 | 1111 Metropolitan Avenue, Suite 650 | Charlotte, NC 28204 | info@avidxchange.com

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AvidInvoice PRODUCT OVERVIEW

AvidXchange's rule-based routing system to streamline invoice processes and approvals.

Key Features

- **ENFORCEABLE APPROVAL WORKFLOWS**

Clients can create an unlimited number of custom, enforceable workflows to determine how specific invoices are routed to specific users or department for approval.

- **AUTOMATED ACCOUNT CODE ASSIGNMENT**

Clients can leverage auto-coding features for assigning GL and other account codes—including allocation codes and intelligent historical analysis.

- **INTEGRATED**

AvidInvoice is integrated to more than 50 accounting systems.

- **EXTENSIVE REPORTING**

Detailed management reports provide analysis of your accounts payable process and efficiency, including accrual reports, approval cycle-time reports and AP activity reports.

- **24/7 VISIBILITY TO INVOICES**

Clients are able to view pending invoices in real-time. "Anywhere, anytime" access provides users access to a central archive—electronic filing cabinet that contains all AP documents.

- **COMPLIANT**

SSAE 16 Certification and Sarbanes-Oxley 404 compliance for accounts payable.

OVERVIEW

Why have over 600 organizations selected AvidInvoice as the industry standard to manage invoice approvals?

AvidXchange's industry-leading SSAE 16 Certification AP workflow solution eliminates lost invoices, late fees, and overnight charges. **AvidInvoice reduces processing costs by 60%, or more.**

AvidInvoice is a web-based paperless invoice management system designed to automate the way companies manage accounts payable documents. This module provides finance executives and AP managers with enforceable controls, powerful reporting and added "visibility" to all documents in their organization while providing invoice "approvers" with features that make it easier to apply accounting codes and approve or dispute invoices.

THE PROCESS

AvidInvoice mirrors your existing invoice approval/AP process. Paper invoices are either scanned into an electronic format, or electronically submitted directly into AvidInvoice – either through direct data-import or through the Vendor Portal. Invoices are automatically coded, assigned to the appropriate workflow and routed electronically for approval. Once fully approved, invoices flow directly into your accounting system for payment processing

LEARN MORE: WWW.AVIDXCHANGE.COM/PAGE/SOLUTIONS



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AvidSync OVERVIEW

AvidXchange's integration solution that enables accounting systems to work with our solutions.

STEPS FOR DATA REPLICATION

1 XML FILE

Select An XML file from the accounts payable system is produced containing any new or updated payments since the last replication event then saves the file to a specified location.

2 MONITORING

The AvidSync service monitors the specified folder location and publishes that file to the secure AvidInvoice web service managing accounting system replications.

3 PARSING

AvidInvoice parses through the file to add or update the appropriate records contained in the file.

4 DISTRIBUTION

AvidInvoice distributes an automated integration audit report notifying the customer of successes and failures related to the records in the file.

5 TRANSFER

The AvidSync service moves the original file from the specified folder to a local archive location.

OVERVIEW

AvidInvoice lets an organization electronically route bills for approval within their company. It provides the ability to apply accounting codes to each bill, create customer specific workflows and publish approved invoices. Ultimately, this allows accounts payables data to be imported directly into the customer's accounting system for payment.

HOW IT WORKS

When an organization first implements AvidInvoice a designated administrator within the organization must populate certain account data from their accounts payable system. This data must then be kept current on an ongoing basis. When changes occur in the accounts payable system these changes require manual entry or a data import into AvidInvoice.

With AvidSync, data can be replicated without any redundant entry necessary. Through AvidSync, various data types will be able to be synchronized on a regular schedule. Vendor data, payment data, budgets and accounting codes are all areas that may be dynamically updated through AvidSync.

LEARN MORE: WWW.AVIDXCHANGE.COM/INTEGRATIONS



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TAB 5

REFERENCES/CLIENT LIST



TAB 5 | QUALIFICATIONS & EXPERIENCE

Hermitage Building

1701 Hermitage Blvd., Tallahassee, FL 32308



PROPERTY OVERVIEW

Property Type: Office

Ownership Entity: Gasco Real Estate Holdings, LLC

Size: 32,000 sf

Number Of Buildings: 1

Contact Info: Jennifer Portz
Gasco Real Estate Holdings LLC
(304) 414-5645

STRATEGIC PLAN OVERVIEW:

Provide full service property management and leasing services for the owner. Our goal is to:

- Maximize income,
- Minimize expenses,
- Provide detailed accounting and reporting,
- Proactively maintain the physical aspects of the property.

Management Start Date:
Sept 2013 - Present

Available for Tour

Miccosukee Commons Building

1803 Miccosukee Commons, Tallahassee, FL 32308



PROPERTY OVERVIEW

Property Type: Office

Ownership Entity: Gasco Real Estate Holdings, LLC

Size: 32,000 sf

Number Of Buildings: 1

Contact Info: Leslie Deel
Gasco Real Estate Holdings LLC
(304) 414-5645

STRATEGIC PLAN OVERVIEW:

Provide full service property management and leasing services for the owner. Our goal is to:

- Maximize income,
- Minimize expenses,
- Provide detailed accounting and reporting,
- Proactively maintain the physical aspects of the property.

Management Start Date:
Sept 2013 - Present

Available for Tour



TAB 5 | QUALIFICATIONS & EXPERIENCE

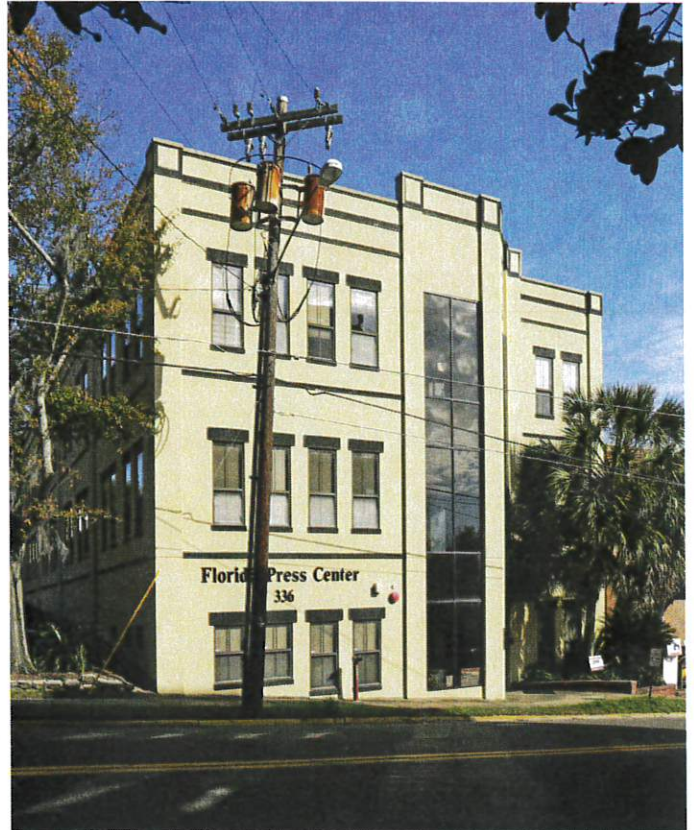
Downtown Office Space Available

336 E College Ave, Tallahassee, FL 32301

Property Address:	336 E College Ave , Tallahassee, FL 32301
Property Type:	Office
Building Size:	14,607 SF
Building Class:	B
Year Built:	1988
Number of Stories:	3

PROPERTY OVERVIEW

Outstanding Opportunity to occupy office space in Downtown Tallahassee. The building was recently acquired by Bayfront Capital Partners, a boutique investment firm, who will be making significant capital improvements to the property. If you are looking for an affordable, clean and tremendously located building in the downtown area, the "Florida Press" building is the perfect fit. The property is in walking distance of the Leon County Courthouse, Capitol Building and City Hall. The property is strategically located within in close proximity to various restaurants, hotels and numerous other commercial uses.



LEASE HIGHLIGHTS

- New Building Ownership
- Walking distance of the Leon County Courthouse, Capitol Building and City Hall.
- Public parking garage right across the street and a private leaseable parking area next door.

Contact Info: Stacy Taylor
Bayfront Capital
Partners, LLC
(404) 936-8936

Management Start Date:
April 2018 - Present

Available for Tour



TAB 5 | QUALIFICATIONS & EXPERIENCE

Gonzalez Office Center

1115 E. Gonzalez St., Pensacola, FL 32501



PROPERTY OVERVIEW

Property Type: Office

Ownership Entity: 1115 E. Gonzalez
Office Center, LLC

Size: 16,973 sf

Number Of
Buildings: 2

Contact Info: Sammy Luker
lukerco@cox.net
(850) 501-2436

STRATEGIC PLAN OVERVIEW:

Provide full service property management and leasing services for the owner. Our goal is to:

- Maximize income,
- Minimize expenses,
- Provide detailed accounting and reporting,
- Proactively maintain the physical aspects of the property.

Management Start Date:
July 2013 - Present



Maritime Place

350 W. Cedar St., Pensacola, FL 32502



PROPERTY OVERVIEW

Property Type: Office

Ownership Entity: Maritime Place, LLC

Size: 66,468 sf

Number Of Buildings: 1

Contact Info: Andrew Rothfeder
Studer Community
Development Group
(850) 232-3003
andrew@studercdg.com

STRATEGIC PLAN OVERVIEW:

Provide full service property management and leasing services for the owner. Our goal is to:

- Maximize income,
- Minimize expenses,
- Provide detailed accounting and reporting,
- Proactively maintain the physical aspects of the property.

Management Start Date:
Aug 2014 - Present

TAB 6

REQUIRED FORMS

ATTACHMENT 1

PROPOSAL FORM

Property Management & Accounting Services
At Innovation Park

Place: Leon County R&D Authority
1736 W. Paul Dirac Drive
Tallahassee, FL 32310

Proposal Due Date: July 2, 2018 at 2:00 PM

Proposal of BECK PARTNERS CRE, LLC hereinafter-called PROPOSER, a corporation organized and existing under the laws of the State of FLORIDA, or a partnership, a company, or an individual doing business as BECK PARTNERS CRE, LLC.

To the Leon County Research and Development Authority, hereinafter referred to as "Authority".

The PROPOSER, in compliance with the Request for Proposals 18-03 for Property Management & Accounting Services (RFP), having examined the specifications with related documents and the sites of the proposed work, and being familiar with all of the conditions of the proposed work, including the availability of materials and labor, hereby proposes to furnish all labor, material and supplies and at the prices shown in the attached Price Schedule. These prices are to cover all expenses incurred in performing the work required under the proposal documents, of which this proposal is a part. These prices are firm and shall not be subject to adjustment provided this Proposal is accepted within ninety (90) days after the time set for receipt of proposals.

PROPOSER hereby agrees to commence work under this contract on or before a date to be specified in a written "Notice to Proceed" to be issued by the Authority.

PROPOSER agrees to perform all work for which he contracts as described in the specifications for the unit prices shown on the attached Price Schedule.

PROPOSER certifies that the attached Price Schedule reflects ONLY MANAGEMENT FEES and does not include any expenses which are the responsibility of the Authority as defined in the Contract provided in Exhibit B to the RFP.

Upon receipt of the Notice of Award, PROPOSER will execute the formal contract attached within seven (7) days and deliver Insurance Certificates and Bonds as required.

The undersigned hereby declares that only the persons or firms interested in the proposal as principal or principals are named herein, and that no other persons or firms than are herein mentioned have any interest in this Proposal or in the contract to be entered into; that this proposal is made without connection with any other person, company, or parties likewise submitting a proposal; and that it is in all respects for and in good faith, without collusion or fraud.

RFP Number 18-03: Property Management and Accounting Services
Leon County R&D Authority
Submission Deadline: July 2, 2018, 2:00pm

DEVIATIONS FROM SPECIFICATIONS IF ANY:

NONE

I have read all of the specifications and requirements and do hereby certify that all items submitted meet specifications.

COMPANY: BECK PARTNERS CRE, LLC AGENT NAME: BRICE PELFREY, CPM

ADDRESS: 930 THOMASVILLE RD. SUITE 106

CITY: TALLAHASSEE STATE: FL ZIP CODE: 32303

TELEPHONE: 850-727-0003 FAX: 850-479-8736

Respectfully submitted,

Attest:

By: 

Print Name Justin A Beck

Date 6-27-18

By: 

Print Name Brice Pelfrey, CPM

Title MANAGING DIRECTOR of PRIMARY
MANAGEMENT

ATTACHMENT 2
PRICE SCHEDULE

The PROPOSER, in compliance with the request for proposals for the **PROPERTY MANAGEMENT & ACCOUNTING SERVICES**, having examined the scope of work and written specifications, hereby proposes to furnish **PROPERTY MANAGEMENT & ACCOUNTING SERVICES** for the following price.

Property Management Fee per month: \$ 3,250.00

Accounting Fee per month: \$ 1,650.00

Total Fee per month: \$ 4,900.00

Hourly Rates for Additional Maintenance Services Normal Hours \$ 40.00

After Hours/Holidays \$ 55.00

Option 1
Additional Suggested Service Enhancements

Cost of any additional work suggested by Proposer.

Total Cost per month for Option 1 \$ _____

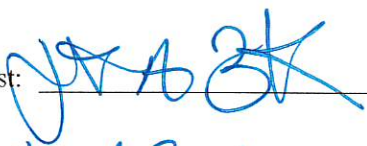
The above prices listed in the Price Schedule shall include all labor, materials, removal, overhead, profit, insurance, and any other costs of the Proposer necessary to perform the Basic Services defined herein.


PROPOSER understands that the Authority is responsible for paying out of its own funds certain costs of repairs, maintenance, administrative and other expenses as defined in the Contract provided in Exhibit B to the RFP, and that inclusion of Authority expenses in the Price Schedule will be cause for rejection of the Proposal.

PROPOSER certifies that, other than Hourly Rates for Additional Maintenance Services as defined in Exhibit B to the RFP, this Price Schedule reflects ONLY MANAGEMENT FEES and does not include any expenses which are the responsibility of the Authority as defined in the Contract provided in Exhibit B to the RFP.

PROPOSER agrees that this proposal shall be good and may not be withdrawn for a period of ninety (90) days after the scheduled closing time for receiving proposals.

Respectfully submitted,

Attest: 
Justin A Beck
Print Name

By: 
Signature
Brian PELFREY, CPA MANAGING DIRECTOR of
Print Name & Title PROPERTY MANAGEMENT

ATTACHMENT 3

EQUAL OPPORTUNITY/AFFIRMATIVE ACTION STATEMENT

1. The Proposer hereby agrees to a commitment to the principles and practices of equal opportunity in employment and to comply with the letter and spirit of federal, state, and local laws and regulations prohibiting discrimination based on race, color, religion, national origin, sex, age, handicap, marital status, and political affiliation or belief.
2. The Proposer agrees to comply with Executive Order 11246, as amended, and to comply with specific affirmative action obligations contained therein.

Signed: _____

Title: _____

Proposer: _____

Address: _____



MANAGING
Director of Property Management

BECK PARTNERS CRE, LLC

530 THOMASVILLE RD. TALLAHASSEE, FL 32303
SUITE 106

From Employee Handbook :

We are powerful creators. We are outcome creators, insight creators, action creators.

We promise only if we have the authority and ability to execute. We commit to anything we can deliver upon to clients or employees, but not until we get the needed approval or resources lined up first. We under-promise and over-deliver.

We are the model of accountability and leadership. We provide the example of accountability and leadership that everyone can follow to success.

Exceptional teams create exceptional companies.

Exceptional companies make a difference for the world.

1-4. Equal Employment Opportunity

Beck Partners Holdings LLC is an Equal Opportunity Employer that does not discriminate on the basis of actual or perceived race, creed, color, religion, alienage or national origin, ancestry, citizenship status, age, disability or handicap, sex, marital status, veteran status, sexual orientation, genetic information, arrest record, or any other characteristic protected by applicable federal, state or local laws. Our management team is dedicated to this policy with respect to recruitment, hiring, placement, promotion, transfer, training, compensation, benefits, employee activities and general treatment during employment.

The Company will endeavor to make a reasonable accommodation to the known physical or mental limitations of qualified employees with disabilities unless the accommodation would impose an undue hardship on the operation of our business. If you need assistance to perform your job duties because of a physical or mental condition, please let your supervisor know. Employees may also contact the ADP MyLife Advisors at (800) 554-1802.

The Company will endeavor to accommodate the sincere religious beliefs of its employees to the extent such accommodation does not pose an undue hardship on the Company's operations. If you wish to request such an accommodation, please speak to your supervisor. Employees may also contact the ADP MyLife Advisors at (800) 554-1802.

If you feel that you have been subjected to conduct which violates this policy, you should immediately report the matter to your supervisor. If you are unable for any reason to contact this person, or if you have not received a satisfactory response within five (5) business days after reporting any incident of what you perceive to be a violation of this policy, please contact your second level supervisor.

Note: If your supervisor or next level manager is the person toward whom the complaint is directed you should contact any higher level manager in your reporting chain. Employees may also contact the ADP MyLife Advisors at 800-554-1802 if they are uncomfortable for any reason using the above procedure. The Company will not allow any form of retaliation against individuals who raise issues of equal employment opportunity.

If you feel you have been subjected to any such retaliation, report it in the same manner you would report a perceived violation of this policy. To ensure our workplace is free of artificial barriers, violation of this policy including any improper retaliatory conduct will lead to discipline, up to and including discharge.

1-5. Non-Harassment

It is Beck Partners Holdings LLC policy to prohibit intentional and unintentional harassment of any individual by another person on the basis of any protected classification including, but not limited to, race, color, national origin, disability, religion, marital status, veteran status, sexual orientation or age. The purpose of this policy is not to regulate our employees' personal morality, but to ensure that in the workplace, no one harasses another individual.

If an employee feels that he or she has been subjected to conduct which violates this policy, he or she should immediately report the matter to their Supervisor. If the employee is unable for any reason to contact this person, or if the employee has not received a satisfactory response within five (5) business days after reporting any incident of what the employee perceives to be harassment, the employee should contact the next level Manager. If the person toward whom the complaint is directed is one of the individuals indicated above, the employee should contact any higher-level manager in his or her reporting hierarchy. Employees may also contact the ADP MyLife Advisors at (800) 554-1802 if they are uncomfortable for any reason using the above procedure. Every report of perceived harassment will be fully investigated and corrective action will be taken where appropriate. All complaints will be kept confidential to the extent possible, but confidentiality cannot be guaranteed. In addition, the Company will not allow any form of retaliation against individuals who report unwelcome conduct to management or who cooperate in the investigations of such reports in accordance with this policy. If an employee feels he or she has been subjected to any such retaliation, he or she should report it in the same manner in which the employee would report a claim of perceived harassment under this policy. Violation of this policy including any improper retaliatory conduct will result in disciplinary action, up to and including discharge. All employees must cooperate with all investigations.

ATTACHMENT 4

**CERTIFICATION REGARDING
DEBARMENT, SUSPENSION,
AND OTHER RESPONSIBILITY MATTERS**

- 1) The Proposer certifies to the best of its knowledge and belief, that it and its principals:
 - a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
 - b) Have not within a three-year period preceding this been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statements, or receiving stolen property;
 - c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State or local) with commission of any of these offenses enumerated in paragraph (1)(b) of this certification; and
 - d) Have not within a three-year period preceding this application/Proposal had one or more public transactions (Federal, State or local) terminated for cause or default.
- 2) Where the Proposer is unable to certify to any of the statements in this certification, such Respondent shall attach an explanation to this Proposal.
- 3) No subcontract will be issued for this project to any party which is debarred or suspended from eligibility to receive federally funded contracts.


Signature

MANALIL DIRECTOR OF PROPERTY MANAGEMENT
Title

BECK PARTNERS CRE, LLC
Proposer's name

530 THOMASVILLE RD. SUITE 106 TALLAHASSEE FL 32303
Address

ATTACHMENT 5

**AFFIDAVIT CERTIFICATION
IMMIGRATION LAWS**

The Authority will not intentionally award Authority contracts to any Proposer who knowingly employs unauthorized alien workers, constituting a violation of the employment provisions contained in 8 U.S.C. Section 1324 A(e) (Section 274a(e) of the Immigration and Nationality Act).

The Authority may consider the employment by any Proposer of Unauthorized Aliens a violation of Section 274A(e) of the INA. **Such violation by the Proposer of the employment provision contained in Section 274A(e) of the INA shall be ground for unilateral cancellation of the contract by the Authority.**

RESPONDENT ATTESTS THAT THEY ARE FULLY COMPLIANT WITH ALL APPLICABLE IMMIGRATION LAWS (SPECIFICALLY TO THE 1986 IMMIGRATION ACT AND SUBSEQUENT AMENDMENTS).

Company Name: BECK PARTNERS CRE, LLC

Signature: [Signature]

Title: MANAGER,¹
Director of Property Management

STATE OF FLORIDA
COUNTY OF ESCAMBIA

Sworn to and subscribed before me this 28th day of JUNE, 2018.

Personally known ✓

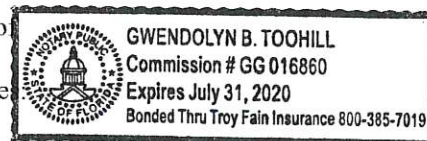
Gwendolyn B. Toohill
NOTARY PUBLIC

OR Produced identification _____

Notary Public - State of _____

(Type of identification)

My commission expires _____



Printed, typed, or stamped
commissioned name of notary public

The signee of this Affidavit guarantees, as evidenced by the sworn affidavit required herein, the truth and accuracy of this affidavit to interrogatories hereinafter made.

THE AUTHORITY RESERVES THE RIGHT TO REQUEST SUPPORTING DOCUMENTATION, AS EVIDENCE OF SERVICES PROVIDED, AT ANY TIME.

ATTACHMENT 6
INSURANCE CERTIFICATION FORM

To indicate that Proposer understands and is able to comply with the required insurance, as stated in the RFP document, the Proposer shall submit this insurance sign-off form, signed by the company Risk Manager or authorized manager with risk authority.

1. Is/are the insurer(s) to be used for all required insurance (except Workers' Compensation) listed by Best with a rating of no less than A:VII?

✓ YES _____ NO

Commercial General Liability: Indicate Best Rating: (A++)XV
Indicate Best Financial Classification: XV (\$2B OR GREATER)

Automobile Liability: Indicate Best Rating: (A++)XV
Indicate Best Financial Classification: XV (\$2B OR GREATER)

2. Is the insurer to be used for Workers' Compensation insurance listed by Best with a rating of no less than A:VII?

✓ YES _____ NO

Indicate Best Rating: (A)XX
Indicate Best Financial Classification: XV (\$2B OR GREATER)

If answer is NO, provide name and address of insurer:


3. Is the Proposer able to obtain the required types and limits of coverage for this RFP, as identified within the solicitation package? Be sure to carefully review and ascertain that the Proposer either has coverage or will place coverage at these or higher levels.

✓ YES _____ NO

Please mark the appropriate box:

Coverage is in place ✓ Coverage will be placed, without exception _____

The undersigned declares under penalty of perjury that all of the above insurer information is true and correct.

Name KRISTINE RUSHING Signature 
Typed or Printed

Date 6/28/18 Title MANAGER WITH RISK AUTHORITY
(Company Risk Manager or Manager with Risk Authority)

ATTACHMENT 7

DRUG FREE WORK PLACE FORM

Drug-Free Work Place: Yes ✓ N/A _____

If **Yes**, please complete the remainder of this form.

The undersigned proposer hereby certifies that BECK PARTNERS CRE, LLC (Name of Business) does:

Publish statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the workplace and specifying the actions that will be taken against employees for violations of such prohibition.

Inform employees about the dangers of drug abuse in the workplace, the business's policy of maintaining a drug-free workplace, any available drug counseling, rehabilitation, and employee assistance programs, and the penalties that may be imposed upon employees for drug abuse violations.

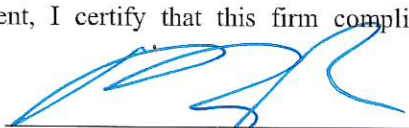
Give each employee engaged in providing the commodities or contractual services that are proposed a copy of the statement specified in subsection (1).

In the statement specified in subsection (1), notify the employees that, as a condition of working on the commodities or contractual services that are under bid, the employee will abide by the terms of the statement and will notify the employer of any conviction of, or plea of guilty or novo contender to, any violation of Chapter 893 or of any controlled substance law of the United States or any state, for a violation occurring in the workplace no later than five (5) days after such conviction.

Impose a sanction on, or require the satisfactory participation in a drug abuse assistance or rehabilitation program if such is available in the employee's community, by any employee who is so convicted.

Make a good faith effort to continue to maintain a drug-free workplace through implementation of this section.

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



Proposer's Signature

6/28/18

Date

*This form **must** be completed, signed and returned with your response to fulfill the requirements of this RFP*

RFP Number 18-03: Property Management and Accounting Services
Leon County R&D Authority
Submission Deadline: July 2, 2018, 2:00pm

ATTACHMENT 8
LOCAL VENDOR CERTIFICATION

The undersigned, as a duly authorized representative of the vendor listed herein, certifies to the best of his/her knowledge and belief, that the vendor meets the definition of a Local Business. For purposes of this section, "local business" shall mean a business which:

- a) Has had a fixed office located in and having a street address within Leon, Gadsden, Wakulla, or Jefferson County for at least six (6) months immediately prior to the issuance of the request for competitive bids or request for proposals by the Leon County R&D Authority; and
- b) Holds any business license required by Leon County (or one of the other local counties), and, if applicable, the City of Tallahassee; and
- c) Is the principal offeror who is a single offeror; a business which is the prime contractor and not a subcontractor; or a partner or joint venturer submitting an offer in conjunction with other businesses.

Please complete the following in support of the self-certification and submit copies of your County and City business licenses. Failure to provide the information requested will result in denial of certification as a local business.

Business Name: <u>BECK PARTNERS CRE, LLC</u>	
Current Local Address: <u>930 THOMASVILLE RD. SUITE 106 TALLAHASSEE, FL 32303</u>	Phone: <u>850-727-0003</u> Fax: <u>850-479-8731</u>
If the above address has been for less than six months, please provide the prior address.	
Length of time at this address:	
Home Office Address: <u>151 WEST MAIN STREET SUITE 200 PENSACOLA, FL 32502</u>	Phone: Fax:

[Signature]
Signature of Authorized Representative

6/28/18
Date

STATE OF FLORIDA
COUNTY OF ESCAMBIA

The foregoing instrument was acknowledged before me this 28th day of JUNE, 2018.

By BRICE PELFREY, of BECK PARTNERS CRE LLC,
(Name of officer or agent, title of officer or agent) (Name of corporation acknowledging)

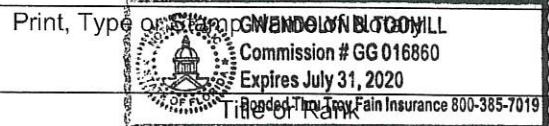
a FLORIDA corporation, on behalf of the corporation: He/she is personally known to me
(State or place of incorporation)

or has produced _____ as identification.
(type of identification)

Gwendolyn B. Jochill
Signature of Notary

Return Completed form with
supporting documents to:

Leon County R&D Authority, Ron Miller
1736 W. Paul Dirac Drive
Tallahassee, Florida 32310



Serial Number, If Any

**Leon County Research and Development Authority (LCRDA) Proposer Registration
Request for Proposals (RFP) Number: 18-03 Property Management & Accounting Services**

Distribution of Solicitation Documents – Documents related to the subject RFP are being distributed via the LCRDA's website, <http://innovation-park.com/opportunities/>.

Official Registration - Companies must officially register, before July 2, 2018, in order to be placed on the proposer registration list for this solicitation. This list is used for communications to prospective companies.

- To register as a proposer, complete the following information in its entirety and email the completed registration form to Ron Miller at rmiller@inn-park.com.
- Potential respondents to the RFP are responsible for reviewing the complete RFP documents and for collecting all addenda prior to submitting their response. Addenda and revisions will not be forwarded automatically. Potential respondents are advised to check the LCRDA's website <http://innovation-park.com/opportunities/> periodically and prior to submitting their response.

Name of the Company: Beck Partners CRE, LLC		
Company's Mailing Address: 930 Thomasville Rd. Suite 106		
City: Tallahassee	State: FL	Zip Code: 32303
Telephone: 850- 727-0003	Fax: 850-479-8736	E-Mail: bpelfrey@teambeck.com
Primary Contact Person for the Company: Brice Pelfrey, CPM		
Contact Person's Mailing Address: 930 Thomasville Rd. Suite 106		
City: Tallahassee	State: FL	Zip Code: 32303
Telephone: 850-382-2277	Fax: 850-479-8736	E-Mail: bpelfrey@teambeck.com

Questions & Answers - Questions concerning the RFP, required submittals, evaluation criteria, response schedule, or selection process, and requests for interpretations or corrections of any or actual or perceived ambiguity, inconsistency or error which the company may discover shall be directed in writing to Ron Miller. Such written questions and requests shall be: (1) received by Ron Miller no later than June 21, 2018 at 2:00 p.m. EST; (2) signed by a person authorized to contractually bind such company; and (3) directed to Ron Miller by the company by e-mail. Answers to such questions will be posted on the LCRDA's website <http://innovation-park.com/opportunities/>.

Communication Prohibition - Prospective respondents are cautioned not to contact any officials other than Ron Miller concerning this RFP.

Contact Information for Ron Miller –

- E-mail: rmiller@inn-park.com

Submit completed registration form to Ron Miller via email at rmiller@inn-park.com.

TAB 6.1

COPIES OF REQUIRED LICENSES AND CERTIFICATIONS



SmartBank.

June 28, 2018

Justin Beck
Beck Partners CRE, LLC
151 W Main St, Ste 200
Pensacola, FL 32502

RE: Banking Reference for Beck Partners CRE, LLC

Dear Mr. Beck,

Pursuant to your request, I am writing this letter to confirm that SmartBank and Beck Partners CRE, LLC with its related entities have maintained a relationship since 2014. SmartBank considers Beck Partners CRE, LLC and its related Beck entities to be some its best clients.

The Beck Related Entities maintain numerous accounts in the five and six figure range and have averaged those amounts for the last four years. All of your accounts have been handled as agreed.

If I may be of further assistance, please call me at 850-857-0320 or contact me by email at johnnie.wright@smartbank.com.

Sincerely,

Johnnie A Wright
Senior Vice President

June 28, 2018

To Whom It May Concern:

Beck Partners Holdings, LLC, has been a client of Warren Averett, LLC, for the last several years. As their CPA, I prepare their annual business and personal tax returns, and I also provide business and tax consulting services on an as needed basis. The company is in good standing with my firm and has a solid reputation in our geographic area. They have remained profitable during the time I have served them as their CPA, and I have witnessed steady growth during this time as well. I would not hesitate to recommend Beck Partners Holdings, LLC, as a client or business provider. If you need anything else or have any questions, please contact me at 850-444-7218.

Sincerely,



P. Scott Warren, CPA
Member



BECK

PARTNERS

This information has been secured by Beck Partners CRE, LLC, from sources believed to be reliable. It is not guaranteed, however, and should be verified prior to consummating any transaction.

Brice Pelfrey, CPM

Director of Property Management
850.477.7044
C 850.382.2277
bpelfrey@teambeck.com