



December 31, 2024

Good afternoon Ms. Nunez,

We appreciate the opportunity to earn your business and look forward to working with you and your association to help meet your reserve study needs. Attached is a current proposal for your consideration. You may review our company history and sample reports on our website <https://www.gabvalue.com/>; this site is designed to provide answers to questions you and the association might have regarding the scope of our reports and their presentation. Please feel free to contact your reserve study specialist with any questions, as they will be your primary contact throughout the process. Have a great day.

We are now offering Milestone & SIRS reports. If you are in need of either of these reports, please let us know and we will send you information to obtain a bid proposal for these reports.

Chloe Conners  
[chloe.conners@sedgwick.com](mailto:chloe.conners@sedgwick.com)  
321-313-1557

Best regards,

**Wendy Benefield**

**Wendy Benefield** | Senior Report Editor  
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[www.gabvalue.com](https://www.gabvalue.com) | Caring counts ®

 sedgwick.

Linda Nunez

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5100 Bell Tower Park Boulevard  
Ft. Myers, FL 33912  
(239)274-0723

Page 1

Linda Mimez  
Bell Tower Park POA, Inc.  
5100 Bell Tower Park Boulevard  
Fort Myers, FL 33912

RE: Reserve Study Proposal for Bell Tower Park POA, Inc.

**Scope of Work**

Non-SIRS Reserve Study Update without Inspection for Palms of Perdido Owners Association, Inc.

**Structures and Improvements to be Analyzed**

Please see addendum

**Reserve Study Methodology and Procedures**

Your report will include detailed reserve funding analyses using both the Component Funding Analysis and Cash Flow Analysis (Pooling Method) funding methodologies in compliance with applicable statutory requirements, market standards for similar properties/associations, and your association's specific reserve funding goals. Our state-of-the-art software and reserve study reports are approved by the American Institute of Certified Public Accountants (AICPA).

An electronic preliminary draft report for your association's review will be provided so that any possible factual inaccuracies or differences of opinion can be addressed before a final reserve study report is issued; that way your association can play an active role in the overall process. The association will have 30 days from the date of draft report issue to request changes/revisions; we allow each association one set of agreed-upon changes/revisions to the preliminary draft report at no charge. Additional scenarios/revisions will be billed separately. There will be a minimum 10-14 working day turnaround from the date of our changes/revision confirmation and delivery of a revised report. No changes/revisions to the draft report will be made after 60 days from the date of draft report issue. All reports will be provided in electronic PDF form.

**Association Information Requirements**

We will need from you a copy of your current reserve budget so that our report can be designed to reflect similar reserve classifications/categories making it easier for your association to make direct comparisons between your budget and our findings. We will also need as much recent factual cost history for your reserves as is available. This information will be reconciled with actual costs incurred for similar upgrades at similar properties and our data sources.

### **Company Profile**

For over a century, Sedgwick Valuation Services Division has achieved excellence in quality of service, product, and personnel to all our clients throughout the United States, Canada, Mexico, and the Caribbean. Our Insurance Appraisal, Reserve Study, and Content Appraisal departments constantly work toward maintaining this high quality of excellence. Our approach to servicing our clients is to understand and address the needs of each client. This approach has allowed us to win acceptance with our clients and ensures they receive consistent and quality service that meets or exceeds their expectations.

Our company has a proven history of stability, financial strength, and respect in the marketplace. We will be there when you need us. With Sedgwick Valuation Services Division being a national company with tenure in the marketplace and resources, we can perform reports on properties of virtually any size or use. Your reserve study analyst will have experience in completing reserve study analyses at properties of a similar type, age and use as yours, and has an extensive database of actual costs and useful lives for reserve components similar to yours. Our reserve study department includes analysts who have earned the Reserve Specialist designation from the Community Associations Institute awarded to those who have proven professionalism and excellence in completing reserve study reports.

### **Fee Structure**

This fee is inclusive of all related expenses to complete the final reserve study. Fees will be honored for **60 days** from the date indicated on this proposal. This proposal is based on the assumption that the reserve specialist will have free access to all portions of all buildings included in the reserve study. The total fee is due upon delivery of the draft report.

#### **Please Choose One:**



\$200.00

Reserve Study 1 hour of scenarios

Respectfully submitted,

**Chloe Conners**

Chloe Conners

Reserve Consultant

ACCEPTED BY:

Brandi Wells

SIGNATURE

Brandi Wells

NAME (PLEASE PRINT)

b.Wells@emgflorida.com

EMAIL ADDRESS (PLEASE PRINT)

1/9/25

DATE

CAM

TITLE

21774-0723 ext. 220

PHONE

Linda Nunez

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Page 3

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Addendum

Bell Tower Park POA, Inc.

|   |
|---|
| <b>Clubhouse</b>                                      |
| <b>Pergolas</b>                                       |
| <b>Tiki Hut</b>                                       |
| <b>Bell Tower (41 Entrance)</b>                       |
| <b>Guardhouse</b>                                     |
| <b>(2) Swimming Pools/Spa</b>                         |
| <b>Playground</b>                                     |
| <b>Tennis &amp; Basketball Courts</b>                 |
| <b>Asphalt &amp; Brick Paved Drives &amp; Parking</b> |
| <b>Perimeter Fencing</b>                              |

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Page 4