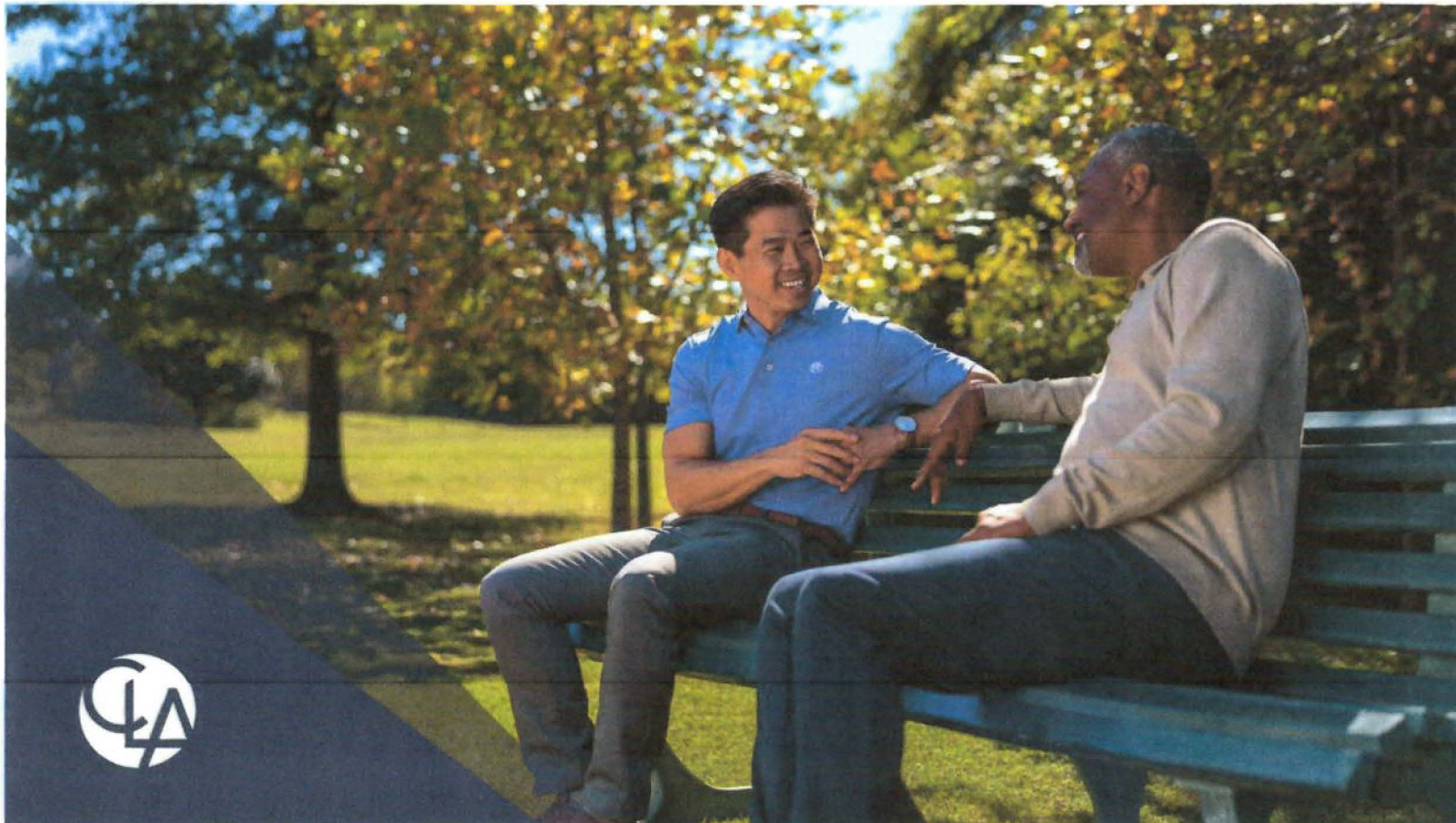




July 27, 2026

Proposal to provide professional
accounting services to:

Town of Dundee

Prepared by:

Kristen Labbe, Principal

Kristen.Labbe@claconnect.com

Direct (863) 680-5615

Anthony Portelli, Client Relationship Director

Anthony.Portelli@claconnect.com

(407) 244-9340

[CLAconnect.com](https://claconnect.com)

CPAS | CONSULTANTS | WEALTH ADVISORS

CLA (CliftonLarsonAllen LLP) is an independent network member of CLA Global. See [CLAglobal.com/disclaimer](https://claglobal.com/disclaimer).

Securities and investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor, member FINRA/SIPC.



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CliftonLarsonAllen LLP
CLAconnect.com

July 27, 2026

Kenneth Cassel
Town of Dundee
202 E Main Street
Dundee, FL 33838

Dear Mr. Cassel:

Thank you for inviting us to propose. We appreciate the opportunity to continue our relationship and share our approach to help Town of Dundee (Town) meet its professional service needs.

The industry-specialized guidance you have come to rely on — whether through financial statement services, preparation of tax returns, or advisory services — will continue to be shared with the overarching goals of helping you **reduce risk, enhance value, protect your legacy, and prepare for the future.**

Our ongoing collaboration has allowed us to understand your specific needs and challenges better. We value our conversations and the insights we gain from listening to you. This is the CLA promise, expressed in the values that drive our behavior: curious, collaborative, transparent, inclusive, and reliable. It's simply how we do business.

We have the qualifications to deliver quality, timely work using clear lines of communication and continuity. This proposal will take you on a journey outlining how we'll continue to work together — and the added value you can expect.

Please contact me if I can provide additional information on our firm or our proposal.

Sincerely,

CliftonLarsonAllen LLP

Kristen Labbe

Kristen Labbe
Principal
(863) 680-5615
Kristen.Labbe@claconnect.com

Anthony Portelli

Anthony Portelli
Client Relationship Director
(407) 244-9340
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Understanding Your Needs

Summary of needs

Our engagement provides you access to the accumulated wisdom of the firm through professionals with substantial experience who can help your organization enhance its future and achieve its business goals.

CLA will provide the following services under the direction of the senior leadership team with specific responsibilities including, but not limited to:

Audit and budget preparation services (thru 9/30/2026)

- Assist management with audit preparation activities, including prioritization of auditor information requests, documentation requests, and related deliverables
- Assist with analysis and reconciliation of cash and other balance sheet accounts, as directed by management
- Assist management with preparation and refinement of budget schedules and supporting analyses
- Participate in management and commission meetings, as requested by management
- Assist with establishing deadlines and tracking audit-related deliverables and open items
- Assisting with year-end close
- Assisting management with prioritization of documentation requests from external audit firm

Ongoing finance and accounting services (beginning 10/1/2026)

CLA will provide interim accounting support during the Town's transition to a permanent finance leadership structure, including:

- Assist with account reconciliations for applicable periods as directed by management
- Assist with maintaining reconciled cash balances and related supporting schedules
- Assist with documenting accounting processes and procedures, as requested by management
- Assist management with identifying process improvement opportunities within accounting operations
- Provide knowledge transfer support and operational documentation to facilitate transition to future finance personnel

Ongoing finance and accounting services (Finance Director hired)

Outsourced accounting functions:

- Assist with onboarding and orientation to existing accounting processes and financial records
- Provide status updates regarding reconciliations, audit matters, and open accounting items
- Assist with transfer of accounting documentation and institutional knowledge
- Participate in transition meetings with management and the Finance Director
- Assist management with establishing a roadmap for continued financial stabilization activities



Your Investment

Having upfront conversations builds relationships.

The value we can provide your organization goes beyond meeting your compliance needs. We can help you discover opportunities to enhance your performance and achieve your strategic goals. Our insights and strategies are tailored to your specific situation and represent a return on your investment.

Based on our understanding of your requirements, we propose the following estimated hours and fees:

Budget/Audit Services – Thru 9/30/2026	Hourly Rate	Hours per week	Monthly Cost
Mike Howard	\$155	40	\$24,800
Robin Flounlacker	\$120	40	\$19,200
Linda Guenther	\$120	8	\$3,840
Estimated monthly fees			\$47,840
Total estimated monthly fee including 7% technology fee			\$51,189

Monthly Accounting Services – Starting 10/1/2026	Hourly Rate	Hours per week	Monthly Cost
Mike Howard	\$155	40	\$24,800
Linda Guenther	\$120	8	\$3,840
Consulting CFO	\$200	Available as needed	-
Total estimated fees			\$28,640
Total estimated monthly fee including 7% technology fee			\$30,645



Monthly Accounting Services – Finance Director Hired	Hourly Rate	Hours per week	Monthly Cost
Mike Howard	\$155	20	\$12,400
Linda Guenther	\$120	4	\$1,920
Consulting CFO	\$200	Available as needed	-
Total estimated fees			\$14,320
Total estimated monthly fee including 7% technology fee			\$15,322

The 7% technology and client support fee supports our continuous investment in technology and innovation to enhance your experience and protect your data.

Our fee quote is designed with an understanding that:

- Town personnel will provide documents and information requested in a timely fashion.
- The operations of your organization do not change significantly and do not include any future acquisitions or significant changes in your business operations.
- There are no significant changes to the scope, including auditing, accounting, or reporting requirements.

No surprises

Our clients don't like fee surprises. Neither do we. If changes or complexities occur — or any "out-of-scope" work is required — we'll discuss a revised fee proposal with you first.

It's not our policy or practice to bill our clients every time we receive a phone call or email. We're invested in our relationships and strongly encourage intentional and frequent communication. Contact us year-round as changes or questions arise.

Our last word on fees: we're committed to serving you and creating a long-standing relationship. If fees are a deciding factor in your selection of a professional services firm, give us a call and let's discuss.

Transparent: Clear, authentic communication and market-based fees.



Firm Overview

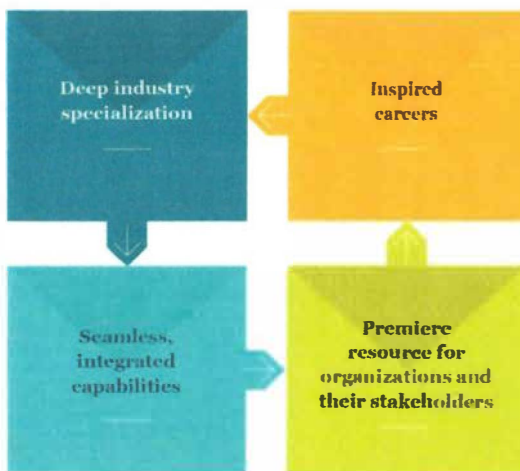
Right there with you.

At CLA, we work alongside you through decisions that shape your work and your life. Big or small, personal or professional, we're here to support what matters now and what's ahead.



As a professional services firm, we exist to create opportunities ... for you, our people, and our communities through industry-focused wealth advisory, digital, audit, tax, consulting, and outsourcing services. We do this when we live the CLA Promise — a promise to know you and help you.

Opportunities for you



You'll find resources you would expect in the largest firms, with the personal touch of people who live and work in your community.

You'll access leaders and professionals in communities across the country, rather than from one central headquarters. We work together to look at your organization holistically, and then help you address challenges by offering support where you need it, from traditional audit and tax to outsourcing and wealth advisory.

As you navigate opportunities and challenges in a competitive and constantly changing environment, we'll embrace change, learn from it, and design processes to make interactions easier, more transparent, and seamless.



Opportunities for our people

At CLA, people find meaningful work in a fun, compelling, and energizing culture. Our people design their own customized careers through our inspired careers strategic advantage. In 2025 our total headcount was relatively the same as in 2024, and we continue to witness a remarkable retention rate of 88%. Inspired by their careers, our family members develop client relationships that bring deeper knowledge and help you shine. We're one family, working together to create opportunities.

What's more, CLA is building a culture of [connection and belonging](#) that welcomes different beliefs and perspectives. We want to represent the communities we serve and foster an environment of inclusion and belonging, resulting in enhanced value for our clients, our communities, and each other.

Inclusive: We embrace all voices and create opportunities by removing barriers and helping our people build inspired careers.

Opportunities for our community

CLA's community impact team unifies the work of connection, belonging and the CLA Foundation with a laser focus on advancing education, employment, and entrepreneurship within CLA and throughout our society.

Since 2015, our [CLA Foundation](#) has granted more than \$16.5 million from nominations made by and funds raised from CLA family members. Each grant recipient's work aligns with the foundation's mission to create career opportunities through education, employment, and entrepreneurship by connecting networks inclusive of all genders and races, veterans, and the disability community.

Read more in CLA's annual [Promise Report](#).

Client Accounting and Advisory Services

Our Client Accounting and Advisory Services (CAAS) practice provides tailored approaches to clients' business needs, whether it's assessing and identifying workflow demands, completing a large-scale project, serving in a vital interim financial role, or providing a fully outsourced accounting function to manage ongoing accounting and finance needs.

Our outsourced accounting services are designed to streamline your financial operations, enhance your financial reporting, and provide strategic insights that drive your business forward. Whether you need assistance with routine accounting tasks, in-depth financial analysis, or strategic growth planning, we are here to support you every step of the way.



Understanding Your Industry

State and local government experience

You can benefit from a close personal connection with a team of professionals devoted to governments. Our goal is to become familiar with all aspects of your operations — not just the information needed for the year-end audit — so that we can offer proactive approaches in the areas that matter most to you:

- Finding new ways to operate more effectively and efficiently
- Responding to regulatory pressures and complexities
- Maintaining quality services in the face of changing budgetary priorities
- Providing transparent, accurate, and meaningful financial information to stakeholders, decision-makers, and your constituents

We understand the legislative changes, funding challenges, compliance responsibilities, and risk management duties that impact you. Our experienced government services team can help you navigate the challenges of today, all while seamlessly strategizing for the future.



References

Our clients say it best. And their independent, authentic perspective is invaluable in learning about the experience you'll have when working with us. We encourage you to connect with our clients to hear about it firsthand.

City of Port Richey	
Client Contact	Don King Jr.
Phone Number Email	(727) 816-1909 City.Manager@cityofportrichey.gov
Address	6333 Ridge Rd, Port Richey, FL. 34668
Services Provided	Outsourced accounting and payroll services

City of Dade City Florida	
Client Contact	Peter Altman
Phone Number Email	(727) 853-1053 altmanp@cityofnewportrichey.org
Address	5919 Main St., New Port Richey, FL. 34652
Services Provided	Outsourced accounting services

City of Treasure Island	
Client Contact	Victor Ortiz
Phone Number Email	(727) 547-4575 vortiz@mytreasureisland.org
Address	10451 Gulf Blvd, Treasure Island, FL. 33706
Services Provided	Outsourced accounting services

Transparent: We place honesty and integrity at the center of all communication. We welcome you to start an open and candid conversation with those who know us best





Meeting Agenda Coversheet

MEETING DATE:		July 7, 2026		Submitted By: Ken Cassel, Town Manager	
SUBJECT: <i>This will be the name of the Item as it will appear on the Agenda</i>		DISCUSSION & ACTION, RESOLUTION 26-17 RATIFYING PRIOR OFFICIAL DOCUMENTS AND AUTHORIZING EXECUTION BY THE MAYOR			
STAFF RECOMMENDATION: (MOTION READY)		Staff recommends a motion to approve the proposal from CliftonLarsonAllen LLP for recurring professional accounting services for the Town of Dundee and authorize staff to execute all necessary documents.			
SUMMARY and/or JUSTIFICATION:		The Town Commission is being asked to consider a proposal from CliftonLarsonAllen LLP (CLA) to provide recurring professional accounting and advisory services for the Town of Dundee. The proposed engagement is intended to assist the Town in addressing past, current, and future financial and operational needs and challenges.			
SELECT, if applicable		AGREEMENT:		☒	
		STAFF REPORT:		☐	
		EXHIBIT(S):		☐	
BUDGET:		☐		☐	
PROCLAMATION:		☐		☐	
OTHER:		☐		☐	
IDENTIFY EACH ATTACHMENT. <i>For example, an agreement may have 2 exhibits, identify the agreement and Exhibit A and Exhibit B</i>					
SELECT, if applicable		RESOLUTION:		ORDINANCE:	
IDENTIFY FULL RESOLUTION OR ORDINANCE TITLE <i>(If Item is <u>not</u> a Resolution or Ordinance, please erase all default text from this field's textbox and leave blank.)</i>					
The proposed fiscal impact is as follows:		The proposed fiscal impact is as follows: FY2026 Remaining Costs: Initial setup and onboarding: \$25,200 Monthly accounting services (August–September): \$25,200 Catch-up accounting and budgeting services: \$189,420 Total FY2026 Cost: \$239,820 Projected FY2027 Costs: Monthly accounting services: \$151,200 Consulting services: \$31,500 Total FY2027 Cost: \$182,700			



May 11, 2026

Proposal to provide professional
accounting services to:

Town of Dundee

Prepared by:

Kristen Labbe, Principal

kristen.labbe@claconnect.com

Direct 863-680-5615

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CliftonLarsonAllen LLP
CLAconnect.com

May 11, 2026

Kenneth Cassel
Town of Dundee
202 E Main Street
Dundee, FL 33838

Dear Mr. Cassel:

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Sincerely,

CliftonLarsonAllen LLP

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kristen.labbe@claconnect.com

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Your Current Reality – What We Know

Take a journey from your current reality to what it could mean to work with CLA

We acknowledge the challenges Town is experiencing and how they could further impact your organization. Consider how seemingly minor issues can have undesirable consequences.

Our impression of your challenges

- **High turnover** — When you don't have a consistent service provider, you lose institutional knowledge and experience that can impact quality, extend timelines, and increase costs. But the true cost is your time — retraining takes you away from more important business priorities.
- **Missed deadlines** — Not closing your books on time impacts lender and vendor relationships and your ability to meet regulatory requirements. Rushed procedures bring increased risk. Bad financial information leads to bad business decisions.
- **Inexperienced team** — A team without necessary skills and knowledge can lead to material misstatements going undetected, or noncompliance with standards and regulations. You also lose the value quotient of the services provided because inexperienced teams don't have insightful suggestions or guidance to offer.
- **Lack of industry experience** — If your service provider can't identify risks and opportunities specific to your business, you lose the added insights of a team immersed in the industry. When your team is unfamiliar with industry regulations, requirements, and practices — it can lead to additional time and costs.
- **Inflexible approach** — Refusal to adapt to new circumstances or standards may restrict your service team's ability to obtain sufficient and appropriate evidence to support conclusions and opinions. You could be stuck with increased hours, reduced quality, inaccurate financial data and statements, and potential legal consequences.
- **Inefficient, manual processes** — Wasting time and effort on repetitive tasks that could be automated can negatively impact profitability, efficiency, workforce morale and retention — and your ability to keep up with changing customer demands and expectations.
- **Outdated systems** — Aging technology often requires more maintenance, repairs, and support and comes with inherent limits for growth and innovation. If your software is not providing timely data — or is not user-friendly, secure, and cost-effective — you can fall behind competitors who have modern, efficient systems.



Imagine Your New Reality With CLA

Pave the way for a stronger future. Working with CLA's knowledgeable and passionate team brings valuable insight and advice you can use to propel your organization toward sustainable growth.

Visualize an experience where you:

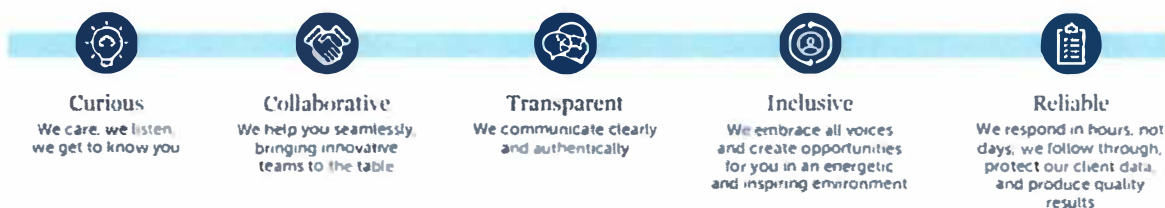
- Achieve long-term financial stability goals with insights from deeply involved principals, directors, and managers who understand your organization and are attuned to your needs
- Make sound decisions based on good information from timely, high-quality services
- Build better collaboration and efficiencies with clear, concise, and constant communication
- Develop constructive growth strategies with tailored advice from attentive, experienced professionals
- Implement sustainable improvements with consistent team members who have built a deep understanding of your operations, systems, risks, and needs over time
- Elevate your organization with support from seamless, scalable services that grow with you
- Improve efficiency and your overall success by automating processes so you can focus on value-added tasks
- Create a competitive advantage from insights derived from timely, meaningful data

Work with people whose values match your own

Our values drive our behavior and lead to service delivery that exceeds expectations and provides you with the [CLA client experience](#).

What does that mean?

It means you'll work with a team with the resources to support the whole of your organization. You can count on industry-specialized professionals who bring relevant and actionable ideas and strategies. Quite simply, you'll encounter value beyond the expected.



Your time is valuable: We know how to deliver quality, timely work, and we take care of the details so you can focus on what really matters: the important decisions that drive your success.



Understanding Your Needs

Summary of needs

Our engagement provides you access to the accumulated wisdom of the firm through professionals with substantial experience who can help your organization enhance its future and achieve its business goals.

CLA will provide the following services under the direction of the senior leadership team with specific responsibilities including, but not limited to:

Initial project services

- Configure FloQast to align with your close process and reporting requirements
- Conduct internal coordination sessions with the CLA engagement team to align on scope, timelines, roles, and responsibilities
- Review and, if needed, restructure the chart of accounts to support reporting, scalability, and alignment with best practices
- Provide training sessions to your team on systems, workflows, and reporting tools
- Ensure your team is comfortable operating within the new environment post-implementation

Ongoing finance and accounting services

Outsourced accounting functions:

- Train town staff as required to ensure accurate and timely data entry with documentation.
- Reconcile balance sheet accounts monthly and prepare journal entries
 - Cash and cash equivalents
 - Receivables – customer accounts, franchise and public service taxes, intergovernmental
 - Accounts payable
 - Unearned revenue
 - Long-term debt
 - Departmental allocations
- Participate in management and commission meetings as requested
- Prepare and analyze financial statement reporting packages monthly
 - Balance Sheet
 - Statement of Revenues, Expenditures, and Changes in Fund Balance
 - Supplementary information included in the financial statement reporting package, if requested, will be prepared and presented for additional analysis purposes.

Consulting and advisory services:

- Assist management with the budgeting/forecasting process
- Prepare budget amendments to Commission and update the budget per Statute
- Assist management in preparation for annual financial statement audit
- Prepare federal Form 1099 and Form 1096 from information provided by you and transmit federal Form 1099 to federal and state taxing authorities on your behalf



Understanding Your Industry

State and local government experience

You can benefit from a close personal connection with a team of professionals devoted to governments. Our goal is to become familiar with all aspects of your operations — not just the information needed for the year-end audit — so that we can offer proactive approaches in the areas that matter most to you:

- Finding new ways to operate more effectively and efficiently
- Responding to regulatory pressures and complexities
- Maintaining quality services in the face of changing budgetary priorities
- Providing transparent, accurate, and meaningful financial information to stakeholders, decision-makers, and your constituents

We understand the legislative changes, funding challenges, compliance responsibilities, and risk management duties that impact you. Our experienced government services team can help you navigate the challenges of today, all while seamlessly strategizing for the future.



Deep industry connections



CLA actively supports industry education as a thought leader and industry speaker. We focus on supporting the educational needs of the industry through nationally sponsored trade events. Our team of professionals is sought after, both as educators and as experienced speakers who are invited to speak and teach at major professional events by leading trade associations, including those shown here.

We are also actively involved in and/or are members of the following professional organizations:

- American Institute of Certified Public Accountants (AICPA)
- AICPA's State and Local Government Expert Panel
- AICPA's Government Audit Quality Center (GAQC)
- Government Finance Officers Association (GFOA)
- Special Review Committee for the GFOA's Certificate of Achievement for Excellence in Financial Reporting (Certificate) Program
- Association of Government Accountants
- Florida State Society of CPAs
- Government Accounting and Auditing Committee
- Florida State GFOA
- Accounting, Auditing and Financial Reporting Committee

Our involvement in these professional organizations, combined with various technical services we subscribe to, allows us to be at the forefront of change in the constantly changing government environment. We take our responsibility for staying current with new accounting pronouncements, auditing standards, other professional standards and laws and regulations seriously.

Insight to strengthen your organization

When you're ready to go beyond the numbers to find value-added strategies, we offer resources to help you respond to challenges and opportunities including:

- [National webinars](#) — Access complimentary professional development opportunities for your team.
- [Articles and white papers](#) — Stay current on industry information as issues arise.

Curious: *We care, we listen, we get to know you.*



Support at every turn



With [dedicated services specific to state and local governments](#), you have access to guidance on all aspects of your operations.

- [Audit](#), review, and compilation of financial statements
- Compliance audits (HUD, OMB Single Audits)
- [Cybersecurity](#)
- [Enterprise risk management](#)
- [Forensic accounting, auditing, and fraud investigation](#)
- Fraud risk management
- [Grant compliance](#)
- Implementation assistance for complex Governmental Accounting Standards Board (GASB) statements
- [Internal audit](#)
- [Outsourced business operations](#)
- [Performance auditing](#)
- [Purchase card \(p-card\) monitoring and analytics](#)
- [Risk assessments](#)
- Strategic, financial, and operational consulting
- [Telecom management services](#)
- [Business opportunity assessments](#)
- [System optimization and selection](#)



Your Investment

Having upfront conversations builds relationships.

The value we can provide your organization goes beyond meeting your compliance needs. We can help you discover opportunities to enhance your performance and achieve your strategic goals. Our insights and strategies are tailored to your specific situation and represent a return on your investment.

Based on our understanding of your requirements, we propose the following estimated hours and fees:

Professional Accounting Services – FY2026	Base Fee	Technology Fee	Total Fee
Initial setup and client onboarding	\$24,000 (one-time)	\$1,200	\$25,200
Monthly accounting services – August & September	\$12,000 (monthly)	\$600	\$25,200
Finish catch up and budgeting – Mike & Robin	\$180,400 (hourly)	\$9,020	\$189,420
Total FY2026 remaining costs			\$239,820

Professional Accounting Services – FY2027	Base Fee	Technology Fee	Total Fee
Monthly accounting services	\$12,000 (monthly)	\$600	\$151,200
Consulting services	\$30,000 (hourly)	\$1,500	\$31,500
Total FY2027 costs			\$182,700

Hourly rates are as follows:

Level	Rate
Senior/Robin	\$120
Consulting Controller/Mike	\$155
Consulting CFO	\$200



The 5% technology and client support fee supports our continuous investment in technology and innovation to enhance your experience and protect your data.

Our fee quote is designed with an understanding that:

- Town personnel will provide documents and information requested in a timely fashion.
- The operations of your organization do not change significantly and do not include any future acquisitions or significant changes in your business operations.
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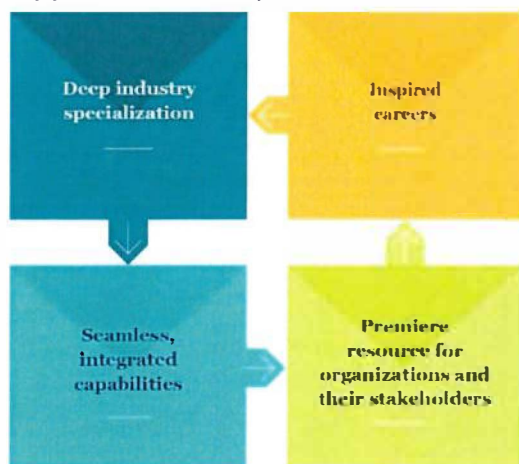
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City of Port Richey	
Client Contact	Don King Jr.
Phone Number Email	(727) 816-1909 City.Manager@cityofportrichey.gov
Address	6333 Ridge Rd, Port Richey, FL 34668
Services Provided	Outsourced accounting and payroll services

City of New Port Richey	
Client Contact	Peter Altman
Phone Number Email	(352) 523-5050 paltman@dadecityfl.com
Address	38020 Meridian Ave, Dade City, FL 33525
Services Provided	Outsourced accounting services

City of Treasure Island	
Client Contact	Victor Ortiz
Phone Number Email	(727) 547-4575 vortiz@mytreasureisland.org
Address	10451 Gulf Blvd, Treasure Island, FL 33706
Services Provided	Outsourced accounting services

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